OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #21-33-SYS
SNAP POS RELEASE NOTES
STREAMLINED POS VERSION 4.2

Date: May 25, 2021	**Subtopic(s):** POS

Purpose:

This policy bulletin is to inform Non Cash Assistance Supplemental Nutrition Assistance Program (NCA SNAP) Center staff that the latest version of the Paperless Office System (POS) will migrate into production on June 21 2021 for the pilot rollout at **TIPS24**, Jamaica Job Center (**054**), Dekalb Job Center (**064**) and Waverly HRA Center (**014**). The citywide rollout will take place on July 12, 2021. Descriptions of the changes can be found in Streamlined POS Release 4.2 **(Attachment A – Overview of Changes), (Attachment B – Fair Hearing), Attachment C – SNAP Separate Determination), (Attachment D – SNAP Changes), Attachment E – Editable Interview Guide) and Attachment F – Attachment Processor and Supervisor Screens).**

These release notes can also be found on the HRA Intranet at:

http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

Effective June 21, 2021

Attachments:

Attachment A	Overview of Changes
Attachment B	Fair Hearing
Attachment C	SNAP Separate Determination
Attachment D	SNAP Changes
Attachment E	Editable Interview Guide
Attachment F	Processor and Supervisor Screens

Attachment A

Streamlined POS Release Notes

Version 4.2, Summer 2021

These Release Notes contain descriptions of changes and fixes in the Streamlined Paperless Office System (SPOS) release 4.2. These and prior Release Notes also be found on the HRA Intranet at http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

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Streamlined POS Release Notes

Version 4.2, Summer 2021

1. Overview of Changes

The Streamlined POS (**SPOS**) project aims to modernize and improve the interview, change actions and processing for the users of the Paperless Office System (POS) in the Supplemental Nutrition Assistance Program (**SNAP**) areas of the Family Independence Administration (**FIA**), the Cash Assistance (**CA**) areas responsible for SNAP Separate Determination in FIA and the and the HIV/AIDS Services Administration (**HASA**), and the Fair Hearing Compliance unit in the Fair Hearing Administration (**FHA**).

Release 4.2 targets the implementation of SPOS interfaces for Fair Hearing Decision actions for FHA staff and SNAP Separate Determination actions for CA staff, along with additional enhancements for FIA SNAP staff.

Release 4.2 is slated to go live in the summer of 2021, with pilot centers going live in June 2021. Fair Hearing and other sites will be rolled out during the city wide rollout of Streamline POS 4.2

The following changes will be introduced in Release 4.2:

- Conversion of Fair Hearing Decisions to SPOS
    - Worker entries in Change Case Data
    - Fair Hearing deferral forms (FHA-2, FHA-2A)
    - Access to Archived Grant Data Report for Fair Hearing staff
    - Workflow for cases requiring new application registration for Fair Hearing Decision processing
    - Approve Deferral Form activity for Fair Hearing Decisions
    - Fair Hearing decision forms (FHA-1, FHA-2B)
    - Supervisor approvals of Fair Hearing Decisions in SPOS
    - Automated posting NYCWAY codes for Fair Hearing Decision processing
- Conversion of SNAP Separate Determination activities to SPOS
    - SNAP Separate Determination
    - SNAP Separate Determination ESNAP
    - Error Correction SNAP Separate Determination
    - Approve SNAP Separate Determination
    - Approve Error Correction SNAP Separate Determination
- New Selective Case Review (SCR) business rules
- ORIA warnings for Supervisors
- IVS CARES match alerts
- New reason selection when an activity is suspended
- Updated W-132S deferral form for SNAP change case data
- Updates to FIA-1146 deferral form to add improved deferral types
- New business rules for child support expenses in case changes
- Ability to quickly deny or close a case from the interview
- Business rules for other income
- Prevent entry of certain unearned incomes for children
- Prevent entry of mistaken start date for income
- Verification widget Other Docs tab rule for LDSS-3151
- Citizenship eligibility factor preset for newborns born to US Citizens
- Residence eligibility factor verified by active MA case
- Business rule for expenses on Case Changes

- Removal of Client Services screen in Streamline POS

2. Detailed Descriptions

Detailed descriptions of the changes can be found in the following attachments:

- Attachment B – Fair Hearing
- Attachment C – SNAP Separate Determination
- Attachment D – SNAP Changes
- Attachment E – Editable Interview guide to help staff make changes to case data
- Attachment F – Processor and Supervisor Screens

3. Policy Reference: SPOS Desk Guide

The SPOS Desk Guide assists SPOS users with commonly performed actions. The guide also provides tips on how to avoid certain common Welfare Management System (WMS) errors.

It is available in Policy Bulletin (PB) 21-25-SYS: Introduction of the Streamlined POS (SPOS) Desk Guide:
https://edocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=b5e5a464-62e4-4bc3-bb66-fab70b5cbe28

4. Policy References: SPOS Release Notes

PB 17-100-SYS: Streamline POS version 1.1 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=4a333a2f-6ec0-4849-9b65-246e39819028

PB 18-01-SYS Streamline POS version 1.2 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=6bc87f2b-d096-4755-8ed0-d4db347f18b5

PB 18-22-SYS Streamline POS version 2.0 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=a9f51c5a-16f6-4273-99e6-3ff1ee46e86f

PB 18-29-SYS Streamline POS version 2.0 Non-citizen workflow
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=e6996fe9-6a43-411e-896f-26dafd405a72

PB 19-06-SYS Streamline POS version 3.1 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=d09dacd7-37fb-4a91-934f-01257cfdb752

PB 19-30-SYS Streamline POS version 3.2 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=7ceb949e-29ff-4560-9bb7-ab6f535154ff

PB 20-74-SYS Streamline POS version 3.3 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=760e74f3-1535-47c7-84e6-4c61cb14e481

PB 21-16-SYS Streamline POS version 4.1 release notes https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=bbadf258-abf8-4d4c-a652-6c67672c6f57

Attachment B

Streamlined POS Release Notes

Version 4.2, Summer 2021

These Release Notes contain descriptions of changes and fixes in the Streamlined Paperless Office System (SPOS) release 4.2. These and prior Release Notes also be found on the HRA Intranet at http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

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Streamlined POS Release Notes

Version 4.2, Summer 2021

1. Overview of Changes

The Streamlined POS (SPOS) project aims to modernize and improve the interview, change actions and processing for the users of the Paperless Office System (POS) in the Supplemental Nutrition Assistance Program (SNAP) area of FIA (Family Independence Administration), the Cash Assistance (CA) area of FIA and the Fair Hearing Compliance unit in the Fair Hearing Administration (FHA).

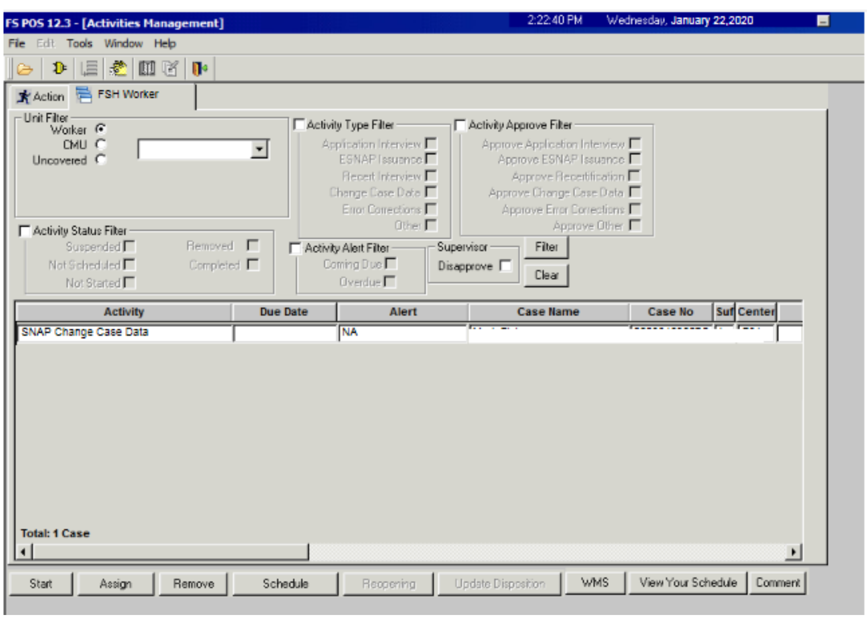
Release 2 targets the implementation of SPOS interfaces for Fair Hearing Decision actions for FHA staff and SNAP Separate Determination actions for CA staff, along with additional enhancements for FIA SNAP staff.

The following changes will be introduced in Release 4.2 for conversion of SNAP Fair Hearing decisions to SPOS:

- Starting the case action
- Fair Hearing Worker entries in Change Case Data
- Fair Hearing deferral forms (FHA-2, FHA-2A)
- Access to Archived Grant Data Report for Fair Hearing staff
- Workflow for cases requiring new application registration for Fair Hearing Decision processing
- Approve Deferral Form activity for Fair Hearing Decisions
- Fair Hearing decision forms (FHA-1, FHA-2B)
- Supervisor approvals of Fair Hearing Decisions in SPOS
- Automated posting NYCWAY codes for Fair Hearing Decision processing

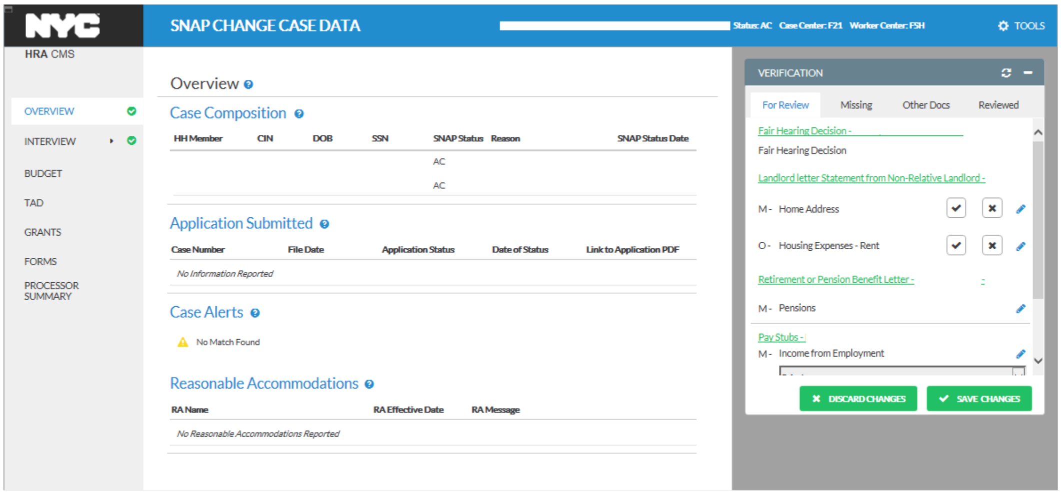
2. Starting the Activity

Each morning the Fair Hearing Evidence Management System (FHEMS) loads SNAP Change Case Data activities for the SNAP Fair Hearing decisions into POS through an automated service. Workers will continue to start their activities from their POS queue. For the SNAP Fair Hearing worker, Streamlined POS will now open when they start the activity.



3. Change Case Data Activity in SPOS

The **Change Case Data** activity opens for the Worker.



This activity includes 7 screens:

- **Overview** – This read-only section provides a high-level overview of the case and opens the Information Verification System (IVS) and the HRA One Viewer when the activity starts.
- **Interview** – This read-only section provides access to the Fair Hearing decision details and interview data in a single screen. It also provides access to the editable Fair Hearing Details and Interview sections.
- **Budget** – This section allows the Worker to calculate a new WMS budget.
- **TAD** – This section allows the Worker to make updates to case and individual status information, and to select new budgets.
- **Grants** – This section allows the Worker to enter new grants.
- **Forms** – This section allows the Worker to prepare forms for the case.
- **Processor Summary** – This section allows the Worker to resolve Resource File Integration (RFI) matches and to submit the case to the Supervisor.

Detailed instructions for the Interview, Budget, TAD, Grants and Forms sections are available in **Policy Bulletin** PB 20-74-SYS Streamline POS Version 3.3 Release Notes. Detailed instructions for the Processor Summary section are available in PB 21-16-SYS Streamlined POS Version 4.1 Release Notes.

4. Worker Entries in Change Case Data

A new **Fair Hearing Details** section in **Interview Review** Screen is added in SPOS 4 Release 2. This new section will provide information from the Fair Hearing decision and will provide access to an **Edit** pencil icon to enter the additional required fields to proceed.

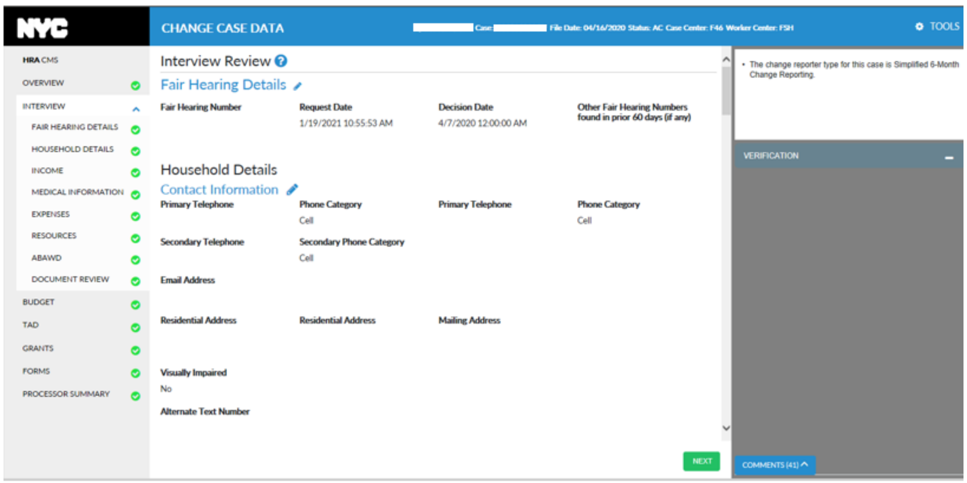
The **Fair Hearing Details** appears in read only mode in the **Interview Review** sScreen for the Fair Hearing Worker when an action comes from a Fair Hearing Decision. Workers can edit the **Fair Hearing Details** displayed in the **Interview Review** screen to review the information needed to process the decision. The **Fair Hearing Details** section has a pencil icon to open the editable view of the data.

- When this pencil icon is clicked, the new **Fair Hearing Details** editable mode opens. Click **Save Changes** once finished entering or editing data.

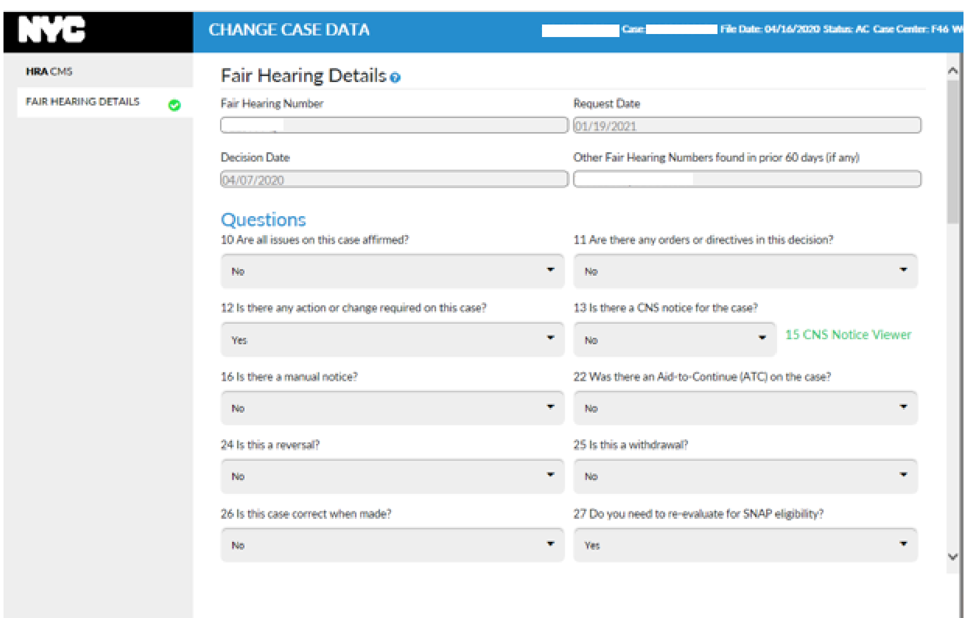
The editable mode provides access to the **Verification** widget and the **Comments** widget, as well as the **Tools** menu. The **Back to Interview Review** button allows the Worker to return to the **Interview Review** screen.

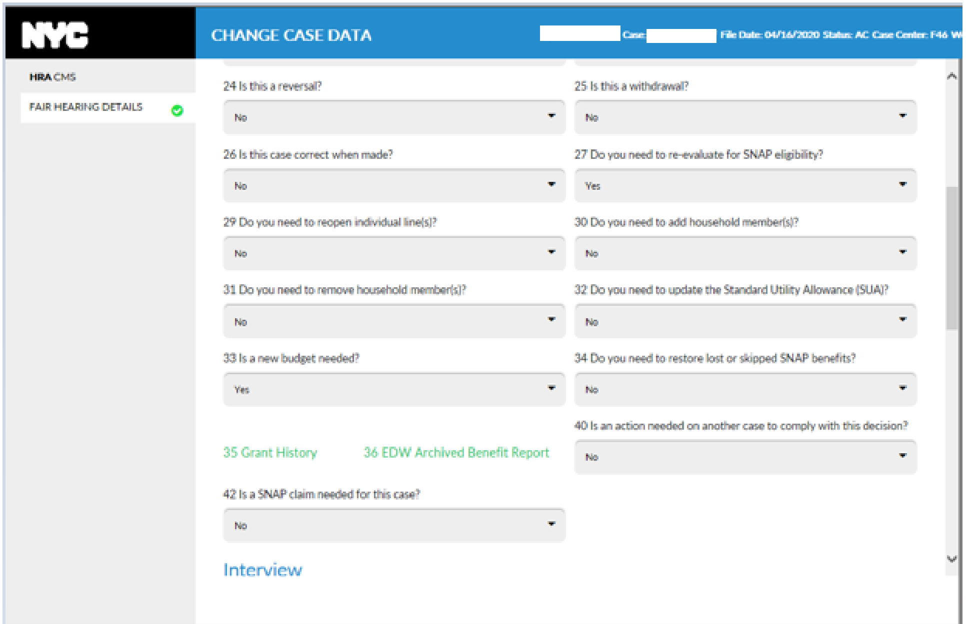
When there are no details available, the section will indicate "There is no Fair Hearing Details information". There is no pencil icon in this case. The **Fair Hearing Details** section is available in the **Interview Review** screen in **Review Case** activity when the case action was done by a Fair Hearing worker, with the data displayed in read-only mode.

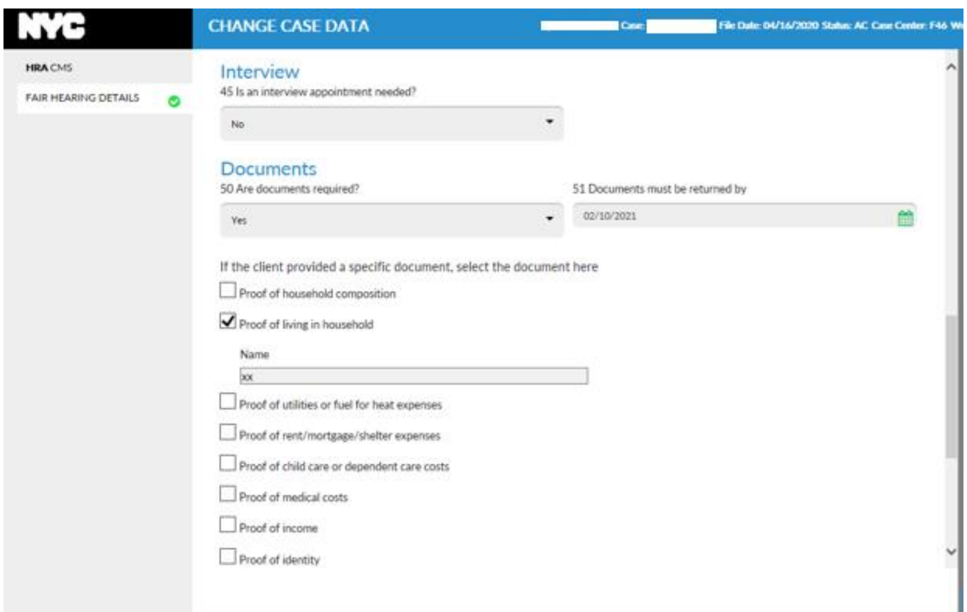
Sample screen of **Fair Hearing Details** in read-only mode on **Interview Review** screen

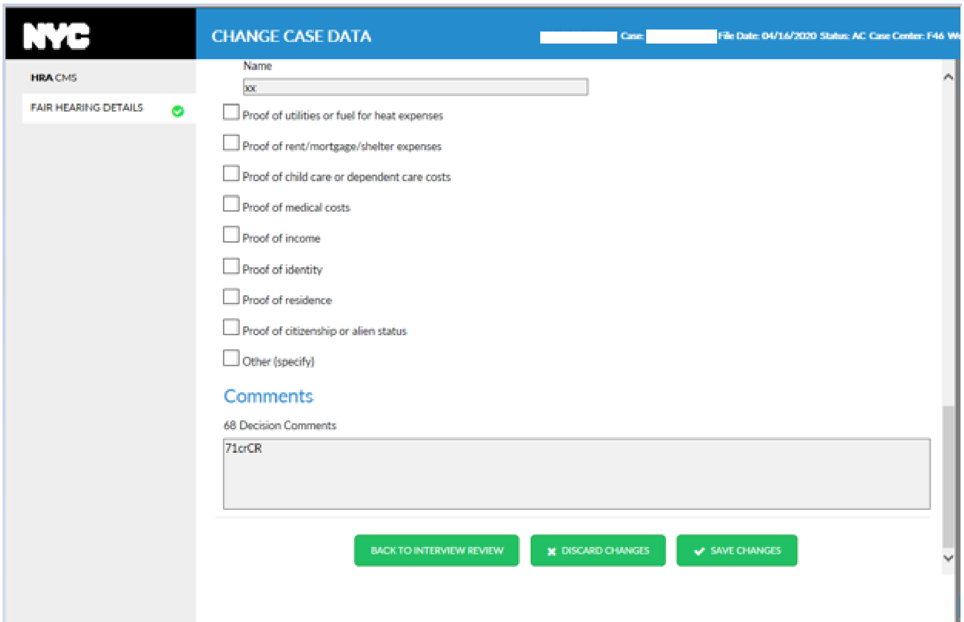


- Clicking the pencil icon next to **Fair Hearing Details** opens editable mode as shown below:




NYC
CHANGE CASE DATA
Case:
File Date: 04/16/2020 Status: AC Case Center: F46 W
HRA CMS
FAIR HEARING DETAILS
24 Is this a reversal?
No
25 Is this a withdrawal?
No
26 Is this case correct when made?
No
27 Do you need to re-evaluate for SNAP eligibility?
Yes
29 Do you need to reopen individual line(s)?
No
30 Do you need to add household member(s)?
No
31 Do you need to remove household member(s)?
No
32 Do you need to update the Standard Utility Allowance (SUA)?
No
33 Is a new budget needed?
Yes
34 Do you need to restore lost or skipped SNAP benefits?
No
40 Is an action needed on another case to comply with this decision?
No
35 Grant History
36 EDW Archived Benefit Report
42 Is a SNAP claim needed for this case?
No
Interview


NYC
CHANGE CASE DATA
Case:
File Date: 04/16/2020 Status: AC Case Center: F46 W
HRA CMS
FAIR HEARING DETAILS
Interview
45 Is an interview appointment needed?
No
Documents
50 Are documents required?
Yes
51 Documents must be returned by
02/10/2021
If the client provided a specific document, select the document here
Proof of household composition
Proof of living in household
Name
xx
Proof of utilities or fuel for heat expenses
Proof of rent/mortgage/shelter expenses
Proof of child care or dependent care costs
Proof of medical costs
Proof of income
Proof of identity



5. Deferral Forms

There is integration of two Fair Hearing Deferral forms for Fair Hearing workers in SPOS using the **SNAP Change Case Data** activity:

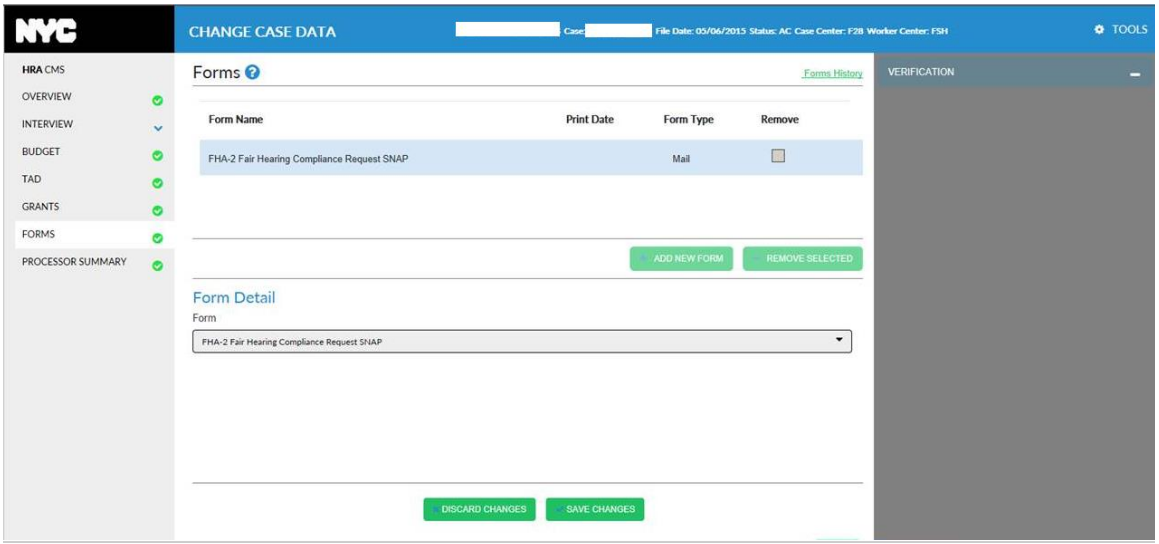
- Form **FHA-2** Fair Hearing Compliance Request SNAP
- Form **FHA-2A** Reminder Notice Fair Hearing Compliance Request SNAP

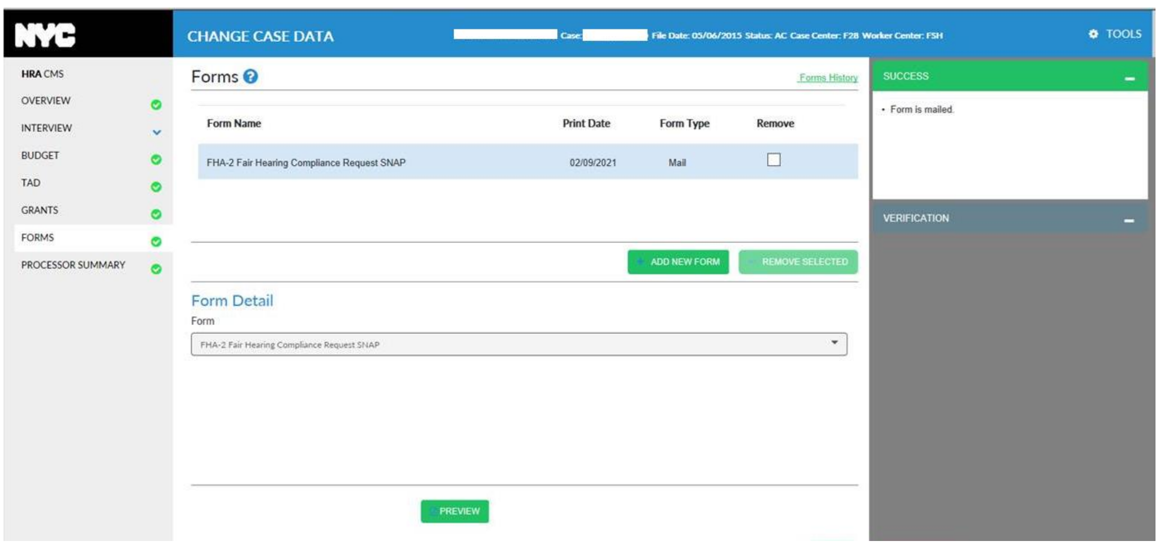
The **FHA-2** form is integrated in SPOS to submit requests for applicant/participant documentation related to a Fair Hearing or inform the applicant/participant that an interview is required with the Fair Hearing Compliance group. The form can be previewed in the **Forms** screen.

- The **FHA-2** form is generated when the Worker indicates that an interview is required for the case and selects the type of interview on the **Fair Hearing Details**.
- If there is a rejection by the State or a complaint, the Worker will be able to generate a second **FHA-2** form.
- The **FHA-2** notice date and due date will be based on the supervisor approval in the **Approve Deferral Form** activity.

The **FHA-2A** form is integrated in SPOS to submit a reminder of requests for applicant/participant documentation related to a Fair Hearing.

- If no documents are submitted by the applicant/participant by the due date of the **FHA-2**, the **FHA-2A** reminder is automatically generated.
- When documents are submitted by the due date, but the Worker determines that documents are still required, the **FHA-2A** form is available for selection in the Forms section in the SNAP Change Case Data activity. The form can be previewed in the **Forms** screen.
- If there is a rejection by the State OR a complaint, the Worker will be able to generate a second **FHA-2A**.
- The **FHA-2A** notice date and due date will be based on the supervisor approval in the **Approve Deferral Form** activity if the form is generated by a Worker.





LDSS-4826 SNAP Application/Recertification Form Request
A Fair Hearing Worker will be able to request the application/recertification form when the Worker has indicated that an interview is required. The Worker can select that the LDSS-4826 Form is required on the **FHA-2** and **FHA-2A** request forms:

- The **LDSS-4826** is attached to the **FHA-2** or **FHA-2A** mailer when requested.
- A due date of 11 business days is placed on the **FHA-2** request form for the **LDSS-4826**.
- A due date of 16 business days is placed on the **FHA-2** request form for the interview.

6. Access to Archived Grant Data Report in Enterprise Data Warehouse (EDW)

A new **Archived Grant History** link has been added to the **Tools** menu under the Welfare Management System (WMS) to allow Fair Hearing staff to review grant issuance information through the reports that the data warehouse provides.

7. Workflow for cases requiring new application registration

If a SNAP case is in rejected status in WMS or the SNAP case status is in closed status in WMS for more than 30 days, the Worker can select **Yes** for the question **Do you need to re-open or re-register the case?**

- If the Worker selects **Yes**, SPOS will save the entry in the details window when the Worker clicks on the Save Changes button.
- The Worker must make all necessary updates to the case, including indicating which household members are part of the case through the Interview Review screen and accessing the editable interview.

- When the Worker clicks **Next** in the **Interview Review** screen, SPOS will create a copy of the case and submit a new application registration to WMS.

Successful application registration
SPOS will save the new WMS application case number and the rejected/closed case as a related case in SPOS:

- SPOS will take the worker to the **Application Interview** for the newly registered case so they can process the re-opening action. The Change Case Data under the Denied (RJ) or Closed (CL) case will stay in the Worker's queue.
- The Worker must process the TAD and budget to place the application case in Single Issue (SI) or Active (AC) status and submit to the Supervisor for approval and transmission to WMS.
- Once the case status is updated in WMS, the Worker will return to the **Change Case Data** activity to complete processing on the case.

Unsuccessful application registration
If the registration of the case is not successful, SPOS keeps users in the **Interview Review** screen and it displays an error message: "Application registration was not successful. Please access the intake list to register the case."

- The Worker must register a new case using the SNAP Reception Intake. The **Change Case Data** under the **RJ** or **CL** case will stay in the Worker's queue.
- The Worker must access the Application Interview with the newly registered case to process the Turnaround Document (TAD) and budget to place the application case in Single Issue (SI) or **AC** status and submit to the Supervisor for approval and transmission to WMS.
- Once the case status is updated in WMS, the Worker will return to the **Change Case Data** activity to complete processing on the case

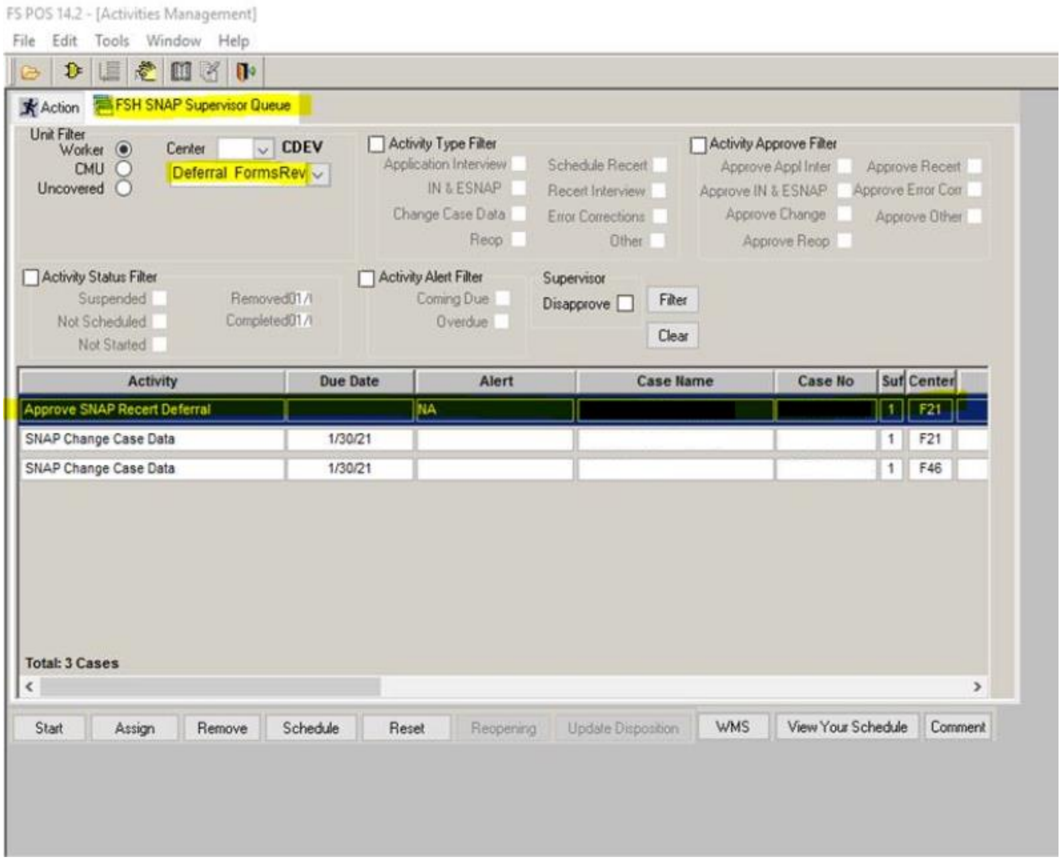
8. Approve Deferral Form activity for Fair Hearing Decisions

A Fair Hearing Supervisor can review the deferral form prepared by the Fair Hearing Worker for approval or disapproval. This Approve Deferral Form activity will be created when the Fair Hearing Worker working from the **SNAP Change Case Data** action creates the **FHA-2** or *FHA-2A* form and suspends the case.

The **Approve Deferral Form** approval activity includes the following SPOS screens:

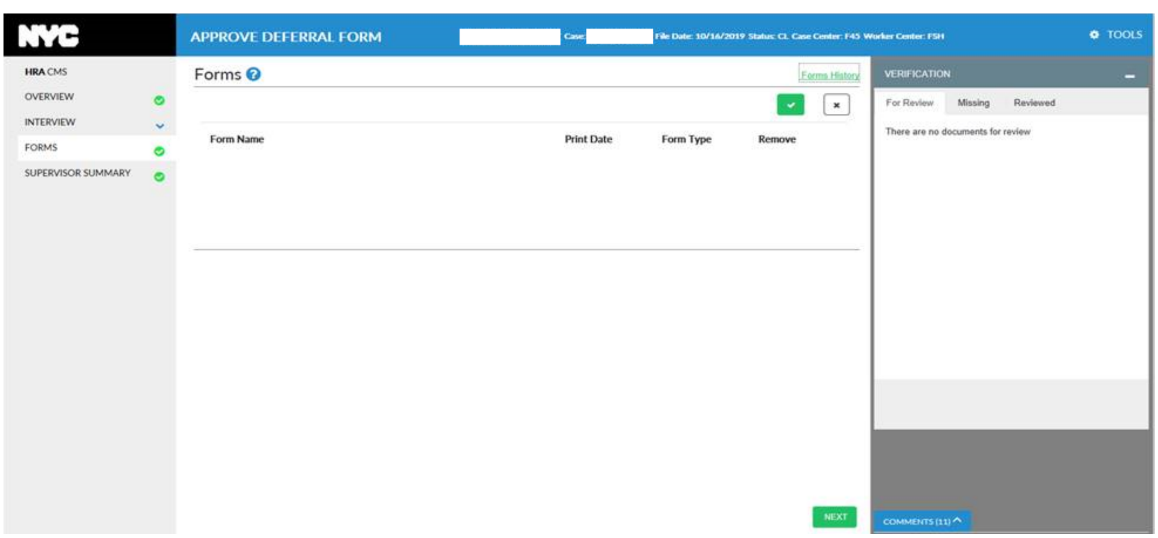
- Overview
- Interview, with approval/disapproval mechanisms
- Forms, with approval/disapproval mechanism
- Supervisor Summary, with RFI approval/disapproval, **Complete** button and **Return to Worker** buttons

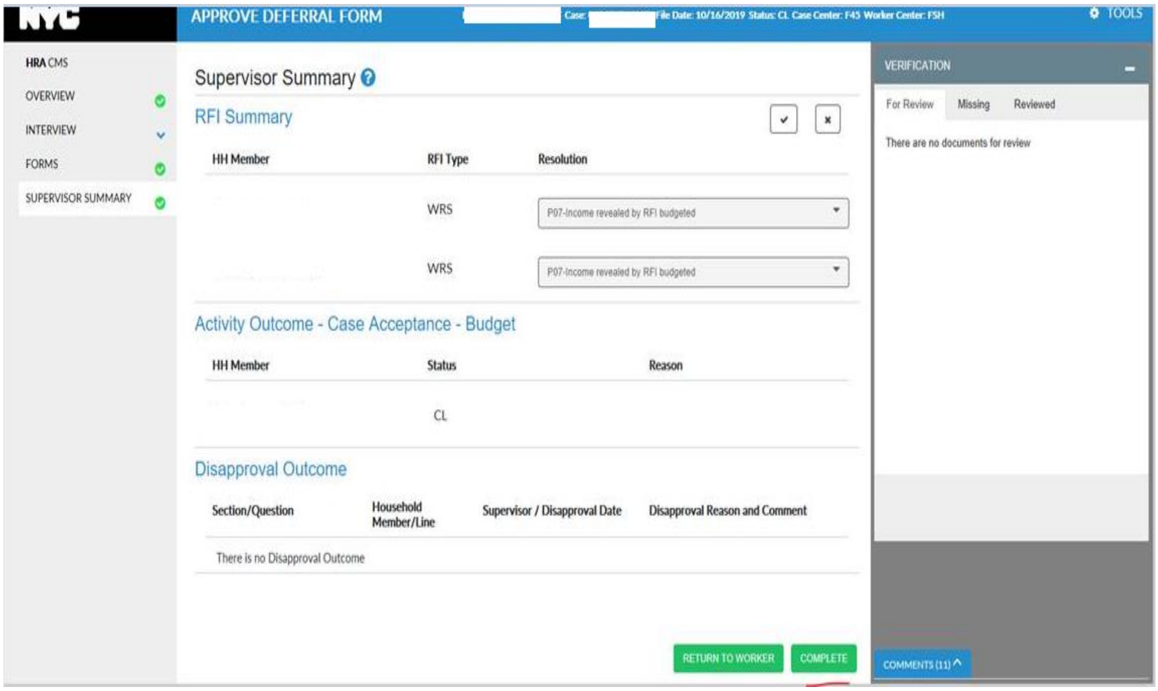
To begin, from the **Deferral FormsReview** queue, the Supervisor must select the Approve action from the queue and click **Start**.



The **Approve Deferral Form** activity opens in Streamline POS:

- On the **Forms** screen, preview the deferral form (**FHA-2** or **FHA-2A**).
  - Click **Forms History** to see the forms created by the Worker.
  - Click on the **Checkmark** icon to approve the **Forms** section, or the **X** icon to disapprove.
- On the **Supervisor Summary**, click **Complete** to approve the deferral or click **Return to Worker** to return the case to the Worker for fixes on the deferral.





9. Supervisor Approval of Change Case Data in SPOS

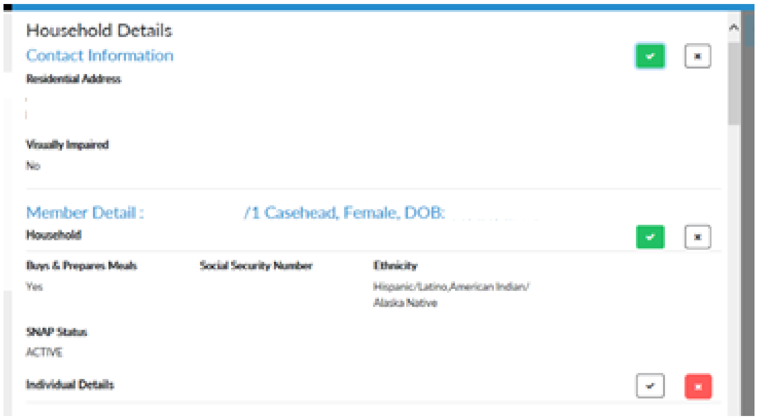
The **Approve Change Case Data** activity opens for the Supervisor once the Worker completes the activity. The approval activity includes seven screens:

- **Overview** – This read-only section provides a high-level overview of the case and opens the Information Verification System (IVS) and the HRA One Viewer when the activity starts.
- **Interview** – This read-only section provides access to the **Fair Hearing Decision Details** and **Interview Data** in a single screen. It allows the Supervisor to approve or disapprove the Worker's action.
- **Budget** – This section allows the Supervisor to review the WMS budget.
- **TAD** – This section allows the Supervisor to review updates to case and individual status information, and to select new budgets.
- **Grants** – This section allows the Supervisor to review new grants.
- **Forms** – This section allows the Supervisor to review the forms for the case.
- **Supervisor Summary** – This section allows the Supervisor to complete the activity and transmit to WMS or to return the case to the Worker for resolution of any disapproved sections.

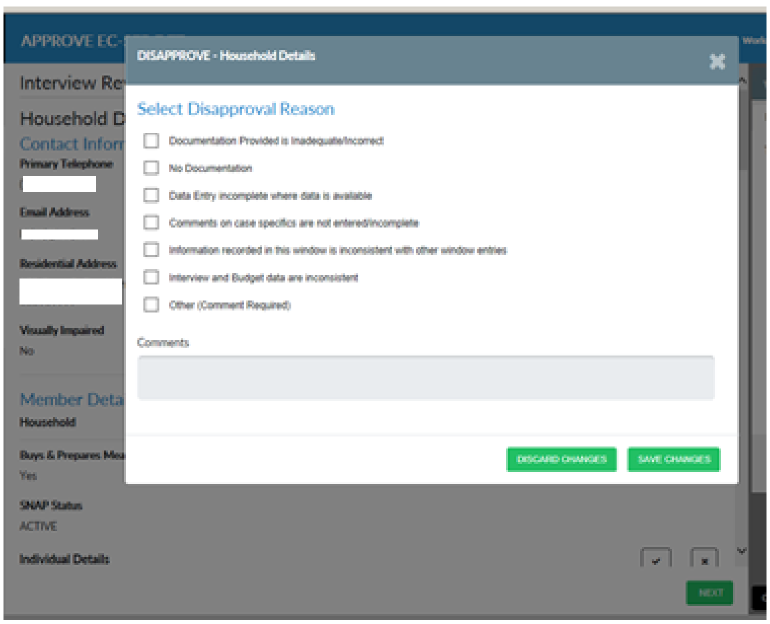
- Clicking on the checkmark icon approves the section. The Supervisor can approve the SNAP activity by approving all screens, and clicking **Complete** on the **Supervisor Summary**.

Example of disapproving a section: click X on the section the Supervisor is disapproving.

- If disapproving, click the **X** icon and a popup window opens where the supervisor can select one or more disapproval reasons and also enter a comment. Continue to approve or disapprove each remaining section on the Interview Review screen and on the subsequent screens.



The disapproval reasons popup window appears as shown below.



- The supervisor can select one or more of the disapproval reasons presented. If **Other** is checked, then a comment is required. Press **Save** Changes

The disapproval reasons will show in a red box for the section that was disapproved as shown here:

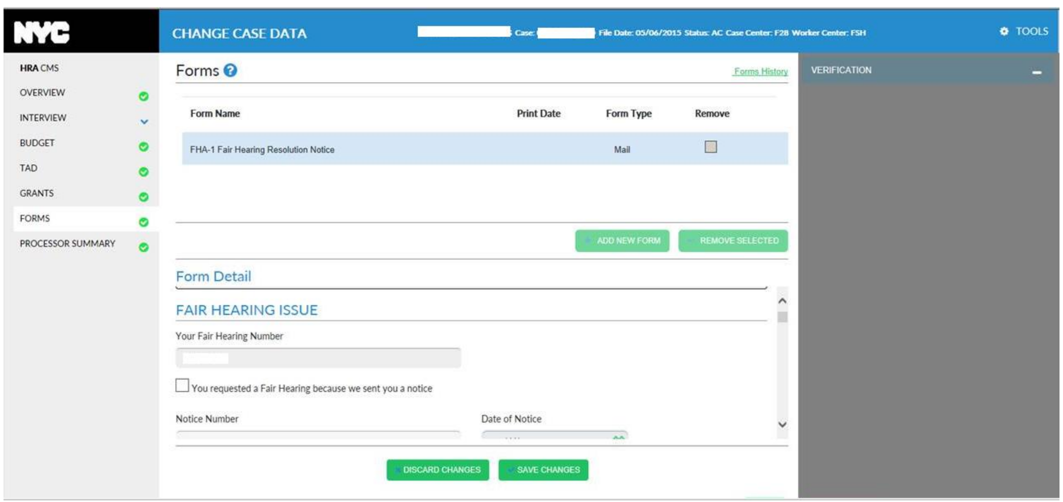
The Supervisor will continue to approve/disapprove each section on the **Interview Review** screen and all the remaining screens. On the **Supervisor Summary** screen, the case can be completed or can be returned to the Worker.

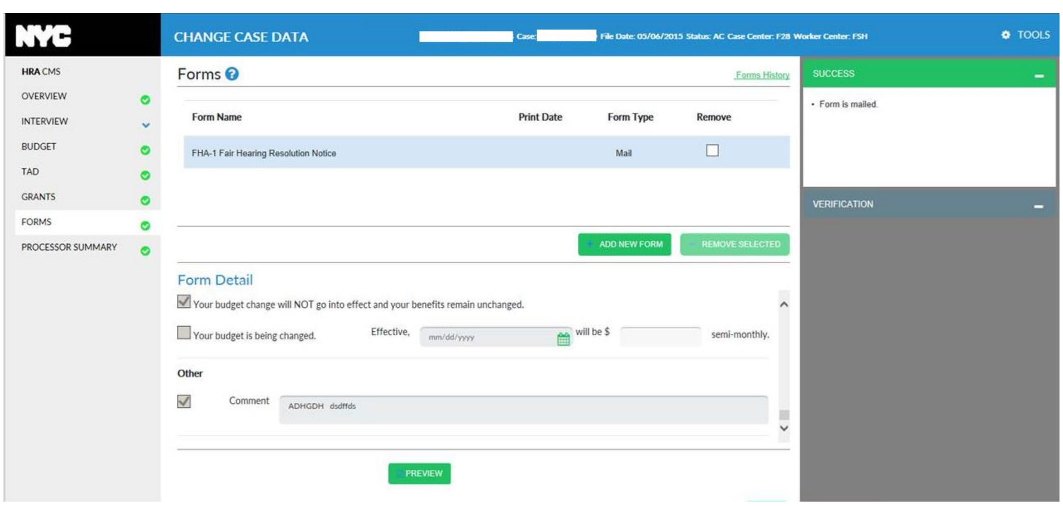
10. Fair Hearing Resolution Notice (FHA-1)

The **FHA-1** form is added to the **Forms** section in the **SNAP Change Case Data** action for Fair Hearing workers. The form is generated by the Supervisor upon approval.
Upon selecting “FHA-1 Fair Hearing Resolution Notice” in the forms window, the data entry window will have various data elements depending upon information obtained from the Fair Hearing Details section. The **FHA-1** form is pre-filled, ready to be mailed through Print to Mail (PTM) or locally printed by a Supervisor.

The form is locally printed if the checkbox for “Your budget change will NOT go into effect and your benefits remain unchanged.” is selected within the budget section of **FHA-1 Data Entry** window:

- The Worker can edit and regenerate the form if needed. If editing the form, click **Save Changes** when finished entering data on the form.
- When a fair hearing has been requested and an advocate is listed, a duplicate copy of the form shall be mailed to the advocate/attorney/representative on record.

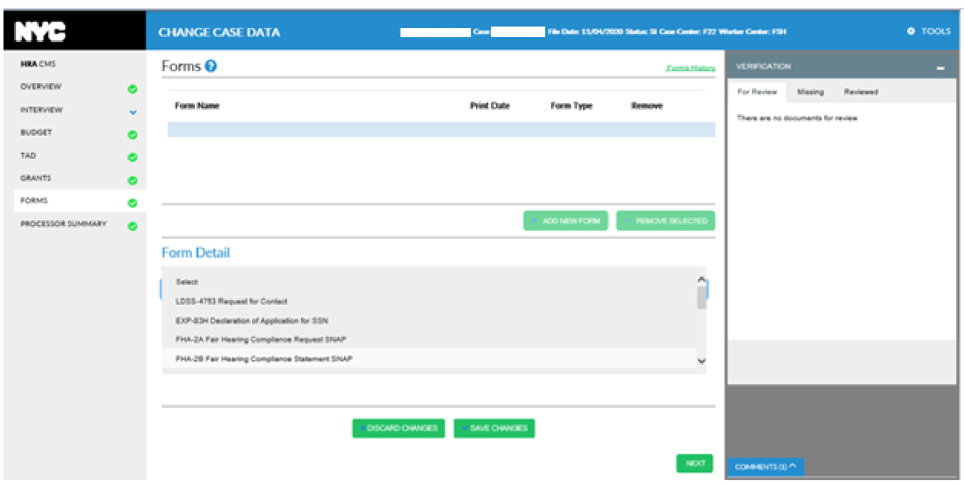


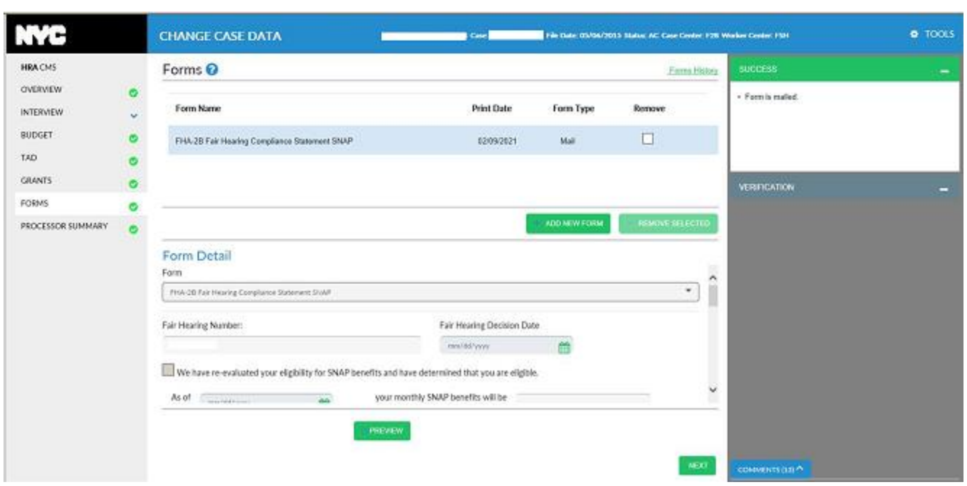


11. Fair Hearing Compliance Statement SNAP (FHA-2B)

The **FHA-2B** form is available for selection for Fair Hearing Workers in the **Forms** section in the **SNAP Change Case Data** activity. When the form is selected, the data entry window for the **FHA-2B** form opens, allowing the Worker to enter the details of the decision for Fair Hearing action:

- The form is a PTM form and is available for Preview for the Worker and the Supervisor. Neither can print the form via SPOS.
- On the processor summary, if the Worker attempts to submit the case to the Supervisor a completion edit runs and will warn the Worker if the form is incomplete with the warning message that reads: "Form FHA-2B is empty. Please return to the Forms screen and enter the details of the Fair Hearing decision."
- The form is generated through the PTM process after the case is approved by the supervisor.
- If WMS transmission is required, the form generates after processing is completed.
- If there is a rejection by the State OR a complaint, the Worker is able to generate a second **FHA-2B.**
- If an advocate is listed, a duplicate copy of the form shall be mailed to the advocate/attorney/representative on record. One copy is sent to the applicant/participant and second copy to advocate/authorized representative, if available.





12. Automated posting NYCWAY codes for Fair Hearing Decision processing

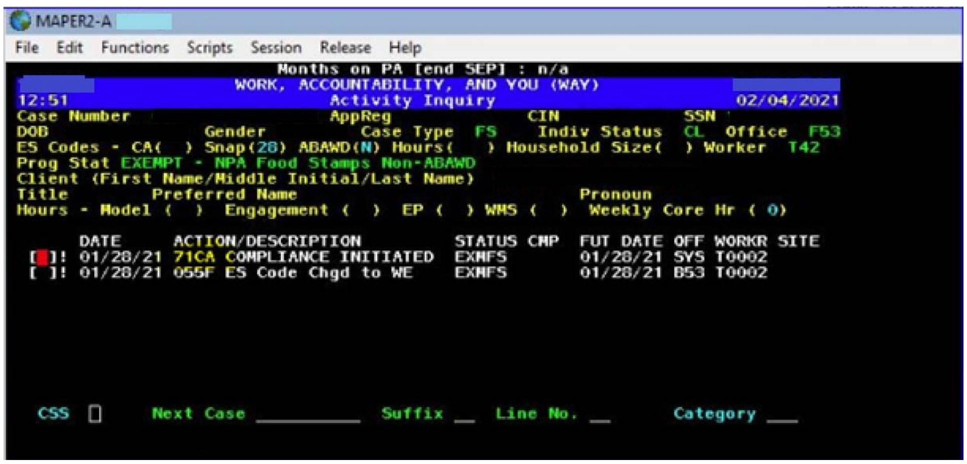
SPOS automatically posts the action codes to NYCWAY for Fair Hearing compliance based on the processing by the Worker and the approval by the Supervisor. The possible codes are:

- **71CA**, Compliance Initiated
- **71CR**, Fair Hearing Compliance Documents Requested
- **71CS**, Fair Hearing Compliance-Second Request for Documents
- **71CN**, Failed to Respond to Fair Haring Compliance Requests and Reminder Notice
- **71CE**, Compliance Completed

Post 71CA when initiating a Fair Hearing Compliance Action

NYCWAY Action Code **71CA** will be posted for a Worker when processing a Fair Hearing Decision. New York City Accountability and You (NYCWAY) is updated with an Initiation of Compliance Action when accessing a SNAP change case data activity**.**

Sample screenshot of posting NYCWAY codes for Fair Hearing



Post 71CR to NYCWAY when additional documents are required

Action Code **71CR** will be posted to NYCWAY for Fair Hearing supervisor from the **Approve Deferral Form** activity when additional documents are required for a Fair Hearing Compliance action to update NYCWAY with the current status that the case is awaiting additional documents:

- If the action code transmitted successfully to NYCWAY, there will be no further transmission of this code.
- If transmission of Action Code **71CR** to NYCWAY failed, the transmission will be repeated until transmission is posted successfully to NYCWAY and it will not post any further codes until **71CR** successfully posts.
- If Action Code **71CA** is not yet posted successfully for the action, code 71CR will not be posted until the **71CA** is successfully posted. Once **71CA** is successfully posted, then Action Code **71CR** will be posted when its conditions are met.

Post 71CS to NYCWAY when a second document request is required

Action Code **71CS** will be posted to NYCWAY for the Fair Hearing supervisor from the **Approve Deferral Form** activity when a SECOND request for additional documents required for a Fair Hearing Compliance action is created to update NYCWAY with the current status that the case now has two outstanding requests for additional documents.

- If the action code transmitted successfully to NYCWAY, there will be no further transmission.
- If transmission of Action Code **71CS** to NYCWAY failed, the transmission will be repeated until transmission is posted successfully to NYCWAY and it will not post any further codes until **71CS** successfully posts.
- If Action Code **71CA** is not yet posted successfully for the action, code 71CS will not be posted until the **71CA** code is successfully posted.
- If Action Code 71CR is not yet posted successfully for the action, code 71CS will not be posted until the **71CR** code is successfully posted. Once **71CR** is successfully posted, then Action Code **71CS** will be posted when its conditions are met.

Post 71CN to NYCWAY when client fails to respond to document request

Action Code **71CN** will be posted to NYCWAY in **Approve SNAP Change Case Data** when a applicant/participant has failed to respond to the second request for additional documents required for a Fair Hearing Compliance action to track the status of documentation in the FHA reporting in NYCWAY:

- If Action Code **71CN** transmitted successfully to NYCWAY, there will be no further transmission of this code.
- If transmission of the **71CN** to NYCWAY failed, the transmission will be repeated until transmission is posted successfully to NYCWAY:
- If SPOS is unable to post **71CN**, a warning message will be displayed at the **Supervisor Summary** screen: **Unable to post NYCWAY Action Code 71CN (Failed to Respond to Fair Hearing Compliance Requests and Reminder Notice).** This message will not stop the supervisor from completing the activity.

Post 71CE to NYCWAY once Fair Hearing Decision is final

Action Code **71CE** with decision will be posted to NYCWAY for the Fair Hearing supervisor through the existing process after WMS processing is completed when a Supervisor has approved a Fair Hearing case, NYCWAY is updated with the Fair Hearing case decision.

13. Access to General and Fair Hearing HRA One Viewer Documents

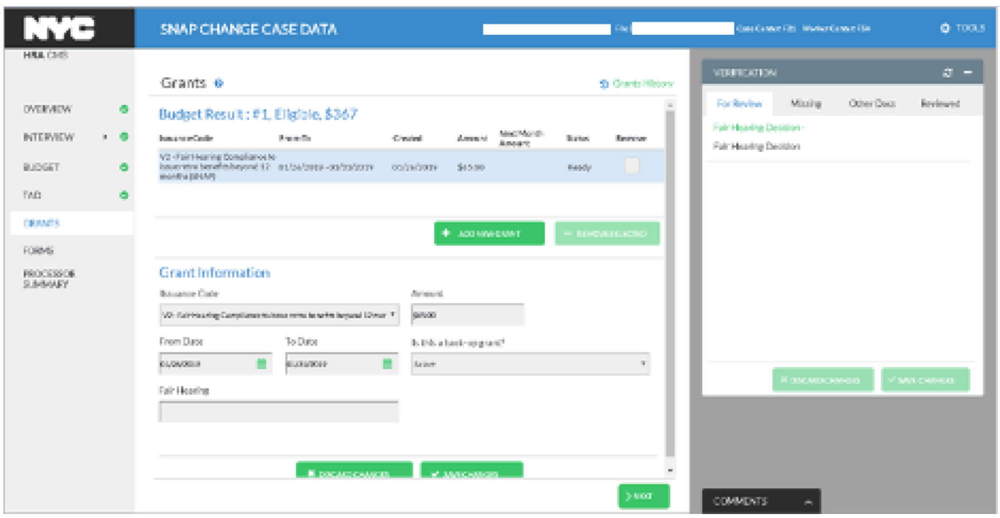
For Fair Hearing workers in SPOS, SPOS is integrated with the HRA One Viewer. Workers will have access to pull documents and packets from the General user interface for document review and compliance completion.

14. Calculation of Budget in single issuance status

A Fair Hearing worker can re-establish a case to issue benefits without authorizing an ongoing benefit by calculating the budget in Single Issue (SI) status on the SPOS TAD and then calculating the new budget through the Budget screen.

15. Pre-fill FH Number when creating a new grant

A Fair Hearing worker will see the Fair Hearing Number pre-filled in the Grants Window "FH Number" box when using issuance code **V2** (Fair Hearing Compliance to issue retroactive benefits beyond 12 months).



16. Policy References: Fair Hearing Compliance

PB 15-111-OPE Announcing Fair Hearing Compliance SNAP Forms
http://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=c41f05d9-cb1d-41d0-bbe5-2b97be1a768a

PB 17-46-OPE Revisions to the Fair Hearing Resolution Notice (FHA-1)
http://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=089e4052-cded-47bf-91c9-3dbf0d02c326

PB 16-03-SYS SNAP POS Release Notes Version 9.3.1 Attachment A SNAP Automated Fair Hearing Compliance and SNAP Fair Hearing Compliance Calendar sections
http://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=2c4f85fb-438b-4042-a34f-5af40eaa3078

17. Policy References: SPOS Release Notes

PB 17-100-SYS: Streamline POS version 1.1 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=4a333a2f-6ec0-4849-9b65-246e39819028

PB 18-01-SYS Streamline POS version 1.2 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=6bc87f2b-d096-4755-8ed0-d4db347f18b5

PB 18-22-SYS Streamline POS version 2.0 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=a9f51c5a-16f6-4273-99e6-3ff1ee46e86f

PB 18-29-SYS Streamline POS version 2.0 Non-citizen workflow
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=e6996fe9-6a43-411e-896f-26dafd405a72

PB 19-06-SYS Streamline POS version 3.1 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=d09dacd7-37fb-4a91-934f-01257cfdb752

PB 19-30-SYS Streamline POS version 3.2 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=7ceb949e-29ff-4560-9bb7-ab6f535154ff

PB 20-74-SYS Streamline POS version 3.3 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=760e74f3-1535-47c7-84e6-4c61cb14e481

PB 21-16-SYS Streamline POS version 4.1 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=faa300d6-c598-4977-b873-c32976011722

Attachment C

Streamlined POS Release Notes

Version 4.2, Summer 2021

These Release Notes contain descriptions of changes and fixes in the Streamlined Paperless Office System (SPOS) release 4.2. These and prior Release Notes also be found on the HRA Intranet at http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

Table of Contents

Attachment C

Streamlined POS Release Notes

Version 4.2, Summer 2021

1. Overview of Changes

The Streamlined POS (SPOS) project aims to modernize and improve the interview, change actions and processing for the users of the Paperless Office System (POS) in the Supplemental Nutrition Assistance Program (SNAP) area of FIA (Family Independence Administration), the Cash Assistance (CA) area of FIA and the Fair Hearing Compliance unit in the Fair Hearing Administration (FHA).

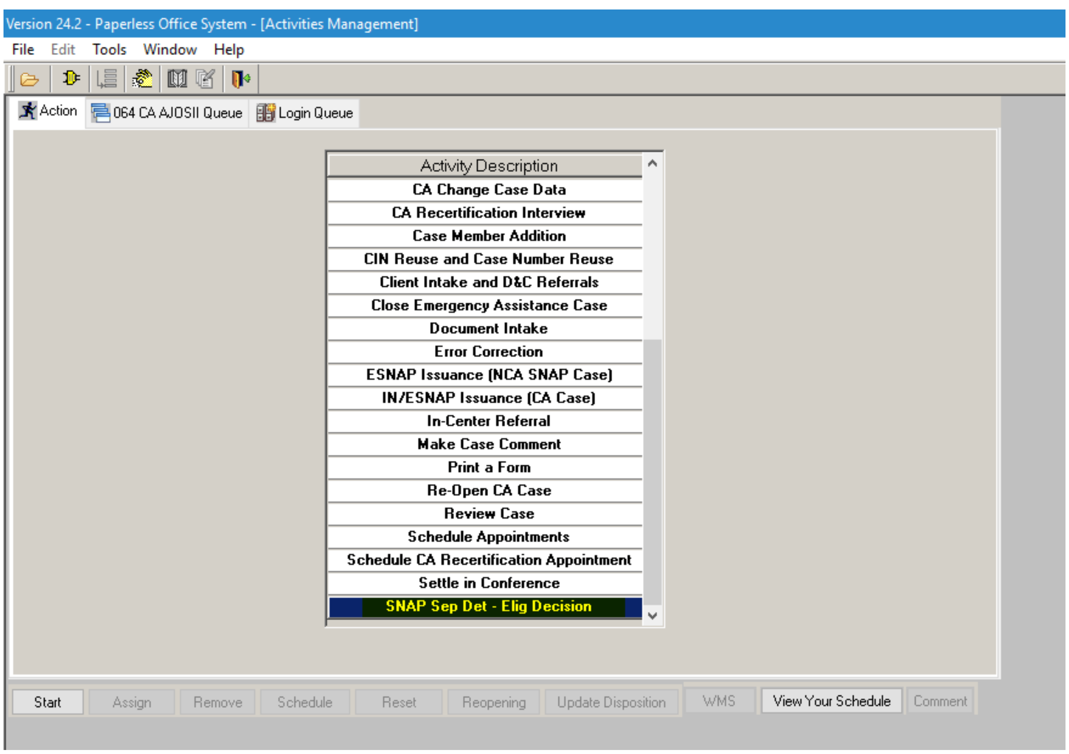
Release 2 targets the implementation of SPOS interfaces for Fair Hearing Decision actions for FHA staff and SNAP Separate Determination actions for CA staff, along with additional enhancements for FIA SNAP staff.

The following changes will be introduced in Release 4.2:

- Conversion of SNAP Separate Determination activities to SPOS
    - SNAP Separate Determination
    - SNAP Separate Determination ESNAP
    - Error Correction SNAP Separate Determination
    - Approve SNAP Separate Determination
    - Approve Error Correction SNAP Separate Determination

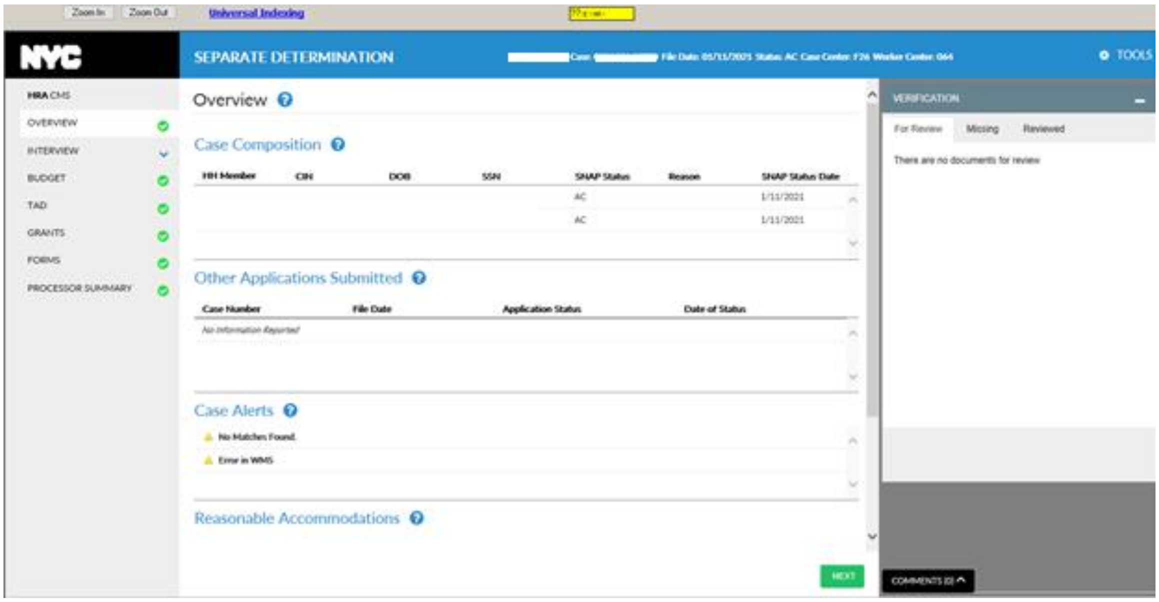
2. Starting the Activity

Workers will continue to start their activities from their POS queue. For the CA Worker responsible for the SNAP separate determination, Streamlined POS will now open when they start the activity.



3. Separate Determination Activities in SPOS

The CA Workers will use SPOS to process SNAP separate determinations.



The **SNAP Separate Determination** and the **Error Correction (EC) of Separate Determination** activity includes 7 screens:

- **Overview** – This read-only section provides a high-level overview of the case and opens the Information Verification System (IVS) and the HRA One Viewer when the activity starts.
- **Interview** – This read-only section provides access to the **Interview Data** in a single screen. It also provides access to the editable interview sections.
- **Budget** – This section allows the Worker to calculate a new WMS budget.
- **TAD** – This section allows the Worker to make updates to case and individual status information, and to select new budgets.
- **Grants** – This section allows the Worker to enter new grants.
- **Forms** – This section allows the Worker to prepare forms for the case.
- **Processor Summary** – This section allows the Worker to resolve Resource File Integration (RFI) matches and to submit the case to the Supervisor.

Detailed instructions for the Interview, Budget, TAD, Grants and Forms sections are available in **Policy Bulletin** PB 20-74-SYS Streamline POS Version 3.3 Release Notes. Detailed instructions for the Processor Summary section are available in PB 21-16-SYS Streamlined POS Version 4.1 Release Notes.

4. ESNAP action

When a client applies for a One-Shot Deal and also applies for SNAP, an ESNAP determination must be performed.

The SNAP Separate Determination activity will open in processor mode. In order to screen for ESNAP on a SNAP Separate Determination case, the worker must access the editable interview.

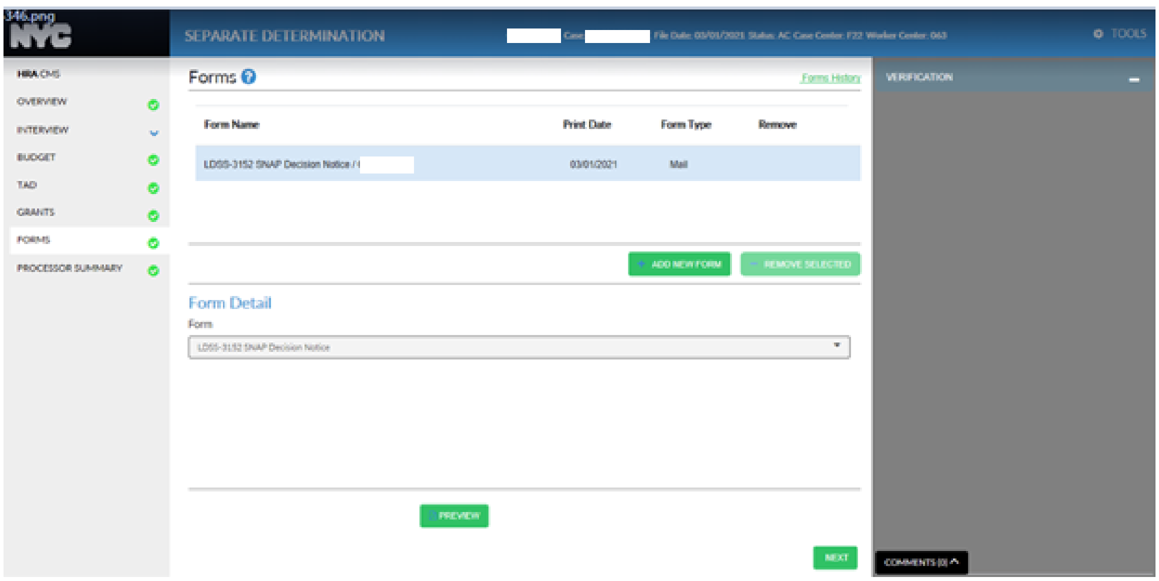
- From the **Interview Review** screen, the Worker will click the **pencil** icon for **Contact Info** and review each interview screens, addressing all matches found. On the **Interview Summary** screen, when the Worker clicks the **Next** button, the **ESNAP Decision** activity will launch in SPOS.

5. Decision for SNAP Application (LDSS-3152) Form

Most decision letters for Separate Determination cases can be generated using the **Client Notice System** (CNS). The CNS notice number is entered on the TAD screen. When the decision letter cannot be generated, the **LDSS-3152** is allowed if the **M3E** Indicator is selected on the SPOS TAD.

System business rules will prevent the use of the **LDSS-3152** when the **SNAP Case Status Reason** selected on the SPOS TAD is **Y45** (Other), **Y94** (Withdrawal) or **Y99** (Other).

- The Worker must click **Preview** to review this form before submitting the case to the Supervisor.



6. Error Correction of SNAP Separate Determination

This activity includes 7 screens:

- **Overview** – This read-only section provides a high-level overview of the case and opens the Information Verification System (IVS) and the HRA One Viewer when the activity starts.
- **Interview** – This read-only section provides access to the **Interview Data** in a single screen. It also provides access to the editable interview sections.
- **Budget** – This section allows the Worker to calculate a new Welfare Management System (WMS) budget.
- **TAD** – This section allows the Worker to make updates to case and individual status information, and to select new budgets.
- **Grants** – This section allows the Worker to enter new grants.
- **Forms** – This section allows the Worker to prepare forms for the case.
- **Processor Summary** – This section allows the Worker to resolve Resource File Integration (RFI) matches and to submit the case to the Supervisor.

7. Approving Separate Determinations

The approval activity for SNAP Separate Determination and Error Correction (EC) of SNAP Separate Determination now opens for the Supervisor in SPOS. The Supervisor will access the activity from their POS queue.

The approval activity includes 7 screens:

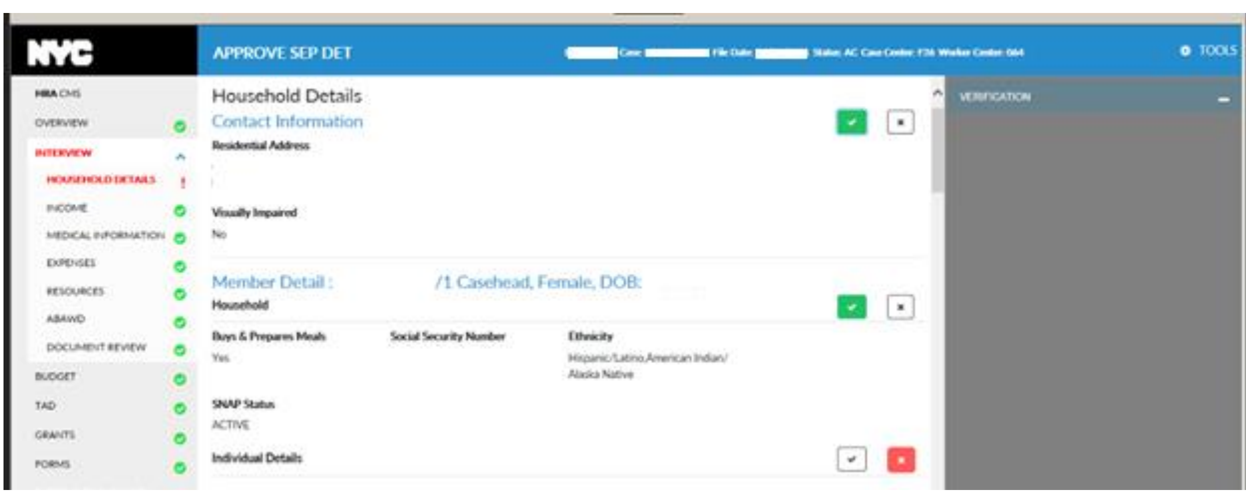
- **Overview** – This read-only section provides a high-level overview of the case and opens the IVS and the HRA One Viewer when the activity starts.
- **Interview** – This read-only section provides access to the **Fair Hearing Decision Details** and **Interview Data** in a single screen. It allows the Supervisor to approve or disapprove the Worker's action.
- **Budget** – This section allows the Supervisor to review the WMS budget.
- **TAD** – This section allows the Supervisor to review updates to case and individual status information, and to select new budgets.
- **Grants** – This section allows the Supervisor to review new grants.
- **Forms** – This section allows the Supervisor to review the forms for the case.
- **Supervisor Summary** – This section allows the Supervisor to complete the activity and transmit to WMS or to return the case to the Worker for resolution of any disapproved sections.

As in other approval actions in Streamlined POS, clicking on the checkmark icon approves the section.

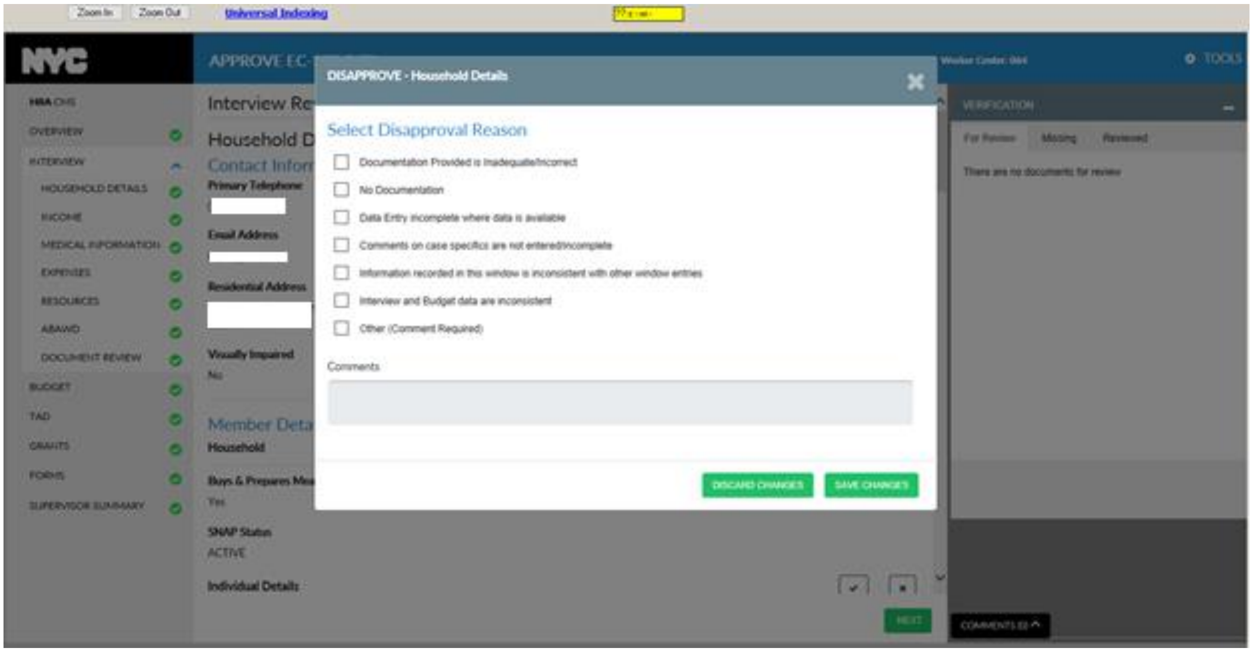
- The Supervisor can approve the **SNAP Separate Determination** activity by approving all screens, and clicking **Complete** on the **Supervisor Summary**. The case will be transmitted to WMS.

Example of disapproving a section: click X on the section the Supervisor is disapproving.

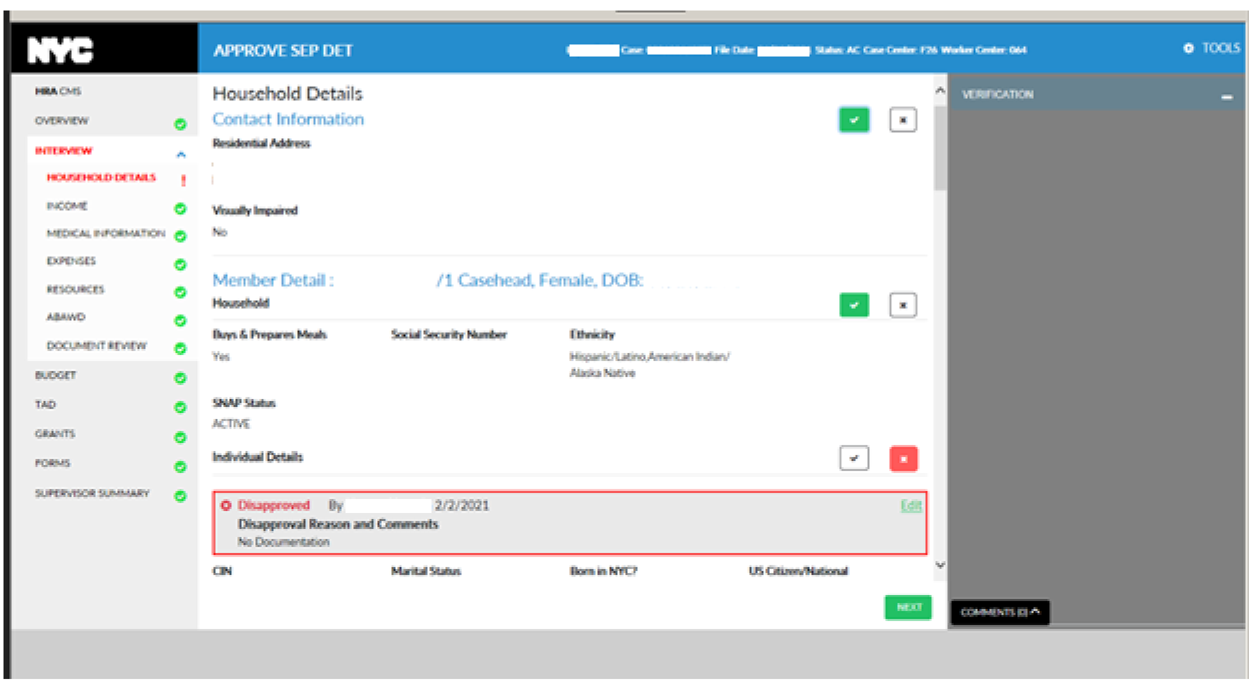
- If disapproving, click the **X** icon and a popup window opens where the Supervisor can select one or more disapproval reasons and also enter a comment. Continue to approve or disapprove each remaining section on the **Interview Review** screen and on the subsequent screens.



The **Disapproval Reasons Popup** window appears as shown below.



- The Supervisor can select one or more of the disapproval reasons presented. If **Other** is checked, then a comment is required. Click **Save Changes**. The disapproval reasons will show in a red box for the section that was disapproved as shown here:



- Continue to approve/disapprove each section on the **Interview Review** screen and all the remaining screens. On **Supervisor Summary** the case can be **Returned to the Worker** or press **Complete** to transmit.

8. Policy References: SPOS Release Notes

PB 17-100-SYS: Streamline POS version 1.1 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=4a333a2f-6ec0-4849-9b65-246e39819028

PB 18-01-SYS Streamline POS version 1.2 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=6bc87f2b-d096-4755-8ed0-d4db347f18b5

PB 18-22-SYS Streamline POS version 2.0 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=a9f51c5a-16f6-4273-99e6-3ff1ee46e86f

PB 18-29-SYS Streamline POS version 2.0 Non-citizen workflow
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=e6996fe9-6a43-411e-896f-26dafd405a72

PB 19-06-SYS Streamline POS version 3.1 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=d09dacd7-37fb-4a91-934f-01257cfdb752

PB 19-30-SYS Streamline POS version 3.2 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=7ceb949e-29ff-4560-9bb7-ab6f535154ff

PB 20-74-SYS Streamline POS version 3.3 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=760e74f3-1535-47c7-84e6-4c61cb14e481

PB 21-16-SYS Streamline POS version 4.1 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=faa300d6-c598-4977-b873-c32976011722

Attachment D

Streamlined POS Release Notes

Version 4.2, Summer 2021

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Table of Contents

Streamlined POS Release Notes

Version 4.2, Summer 2021

1. Overview of Changes

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Release 2 targets the implementation of SPOS interfaces for Fair Hearing Decision actions for FHA staff and SNAP Separate Determination actions for CA staff, along with additional enhancements for FIA SNAP staff.

The following changes will be introduced in Release 4.2:

- New Selective Case Review (SCR) business rule updates
- Office of Refugees and Immigrant Affairs (ORIA) warnings for Supervisors
- Information Verification Service Client Assistance And Rehousing Enterprise System (IVS CARES) match alerts
- New reason selection when an activity is suspended
- Updated Notice of Documentation Required – Change in Household Circumstances (**W-132S**) deferral form for SNAP change case data
- Updates to You Must Submit Documents For Your SNAP Case! (FIA-1146) deferral form to add improved deferral types
- New business rules for child support expenses in case changes
- Ability to quickly deny or close a case from the interview
- Business rules for other income
- Prevent entry of certain unearned incomes for children
- Prevent entry of mistaken start date for income
- Verification widget Other Docs tab rule for LDSS-3151
- Citizenship eligibility factor preset for newborns born to US Citizens
- Residence eligibility factor verified by active Medical Assistance (MA) case
- Business rule for expenses on Case Changes
- Removal of Client Services screen in Streamline POS

2. Selective Case Review (SCR) Business Rule Updates

At the time of submission of Worker actions to the Supervisor, SPOS decides whether the approval is required based on the SCR business rules.

HRA's updated SCR plan intends to focus a higher rate of supervisory review on cases with higher error risk. The Selective Case Review rules apply to SNAP applications, recertifications, re-applications, case changes, case transfers, and periodic reports.

3. ORIA Warning for Supervisors

For Supervisors, on a case where there are non-citizens being closed or rejected with reason code **F92** (Ineligible Alien [Timely]), a warning on the Turnaround Document (TAD) will be displayed when this reason code is being used on the case level or the individual level.

The yellow warning message reads:

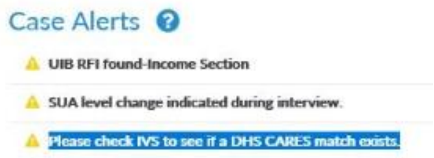
- For **F92** denials, the Supervisor must verify that the ORIA internal clearance was completed by the Worker. If it was not completed, return the case to the Worker and instruct the Worker to request an internal clearance from ORIA by email at ORIA@dss.nyc.gov with the case details, including the case number, names of the non-citizens and the reason(s) that they are ineligible non-citizens. The Worker should copy their Supervisor in the email to ORIA.

4. IVS CARES Match Alerts

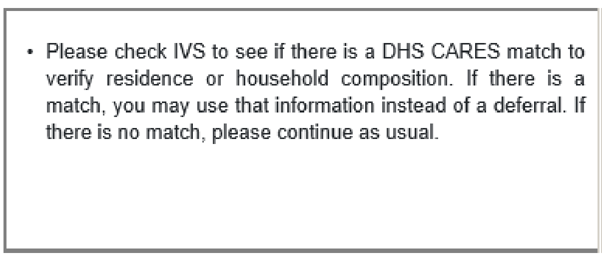
New alerts will appear to advise the Workers and Supervisors to check IVS for the new DHS CARES match. Once it is implemented, it can be used to verify residence and household composition, and to reduce deferrals. These alerts will appear when the case has a temporary shelter type or when the household is homeless.

The new **Case Alert** can appear in the **Overview** screen for interviewers, processors and supervisors indicates:

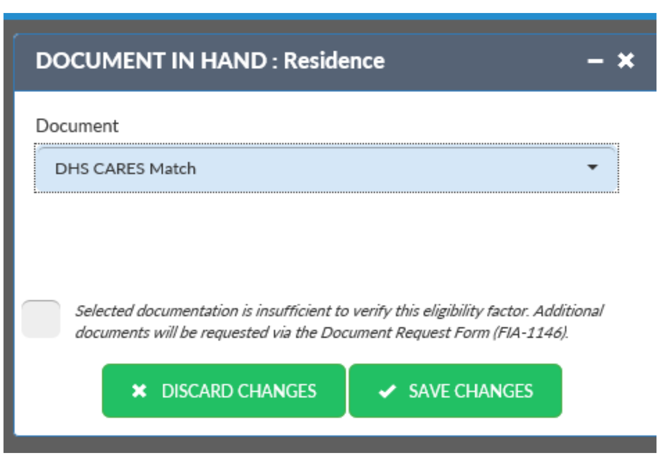
- Please check IVS to see if a DHS CARES match exists.



The alert that will appear in the **Interview Review** and the **Housing Expenses** screens indicates:



When a CARES match is found in IVS and it is sufficient for residence and/or household composition, the Worker can update the **Documentation** by selecting **Document in Hand** and selecting the new document type of **DHS CARES match.**



Shelter Types
The new alerts will appear when the case has one of the temporary shelter types:

- **06** – Hotel/Motel
- **11** – Room Only
- **13** – Domestic violence shelter less than 3 meals/day
- **14** – Domestic violence shelter 3 meals per day
- **15** – Congregate Care Level 1 (NYC/Nassau/Suffolk/Westchester/Rockland)
- **16** - Congregate Care Level 2 State Certified (NYC / Nassau / Suffolk / Westchester / Rockland)
- **23** – Street homeless
- **28** – Congregate Care Level 1 Rest of State
- **29** – Congregate Care Level 2 State Certified Rest of State
- **30** – Scatter Site none Tiers 1, 2 Less than 3 meals a day
- **33** - Shelter Tier 1 or 2 Shelter, under 3 meals/day
- **34** - Shelter Tier 2 Shelter, three meals/day
- **35** – Shelter Non-Tiers
- **42** – Congregate Care Level 3, Adult Homes/DOH Enriched Housing

5. Ability to Quickly Deny or Close a Case from the Interview

In **Editable Interview** mode, a new option called **Quick Denial** appears on the **Tools** menu in the **Application interview** and **Recertification Interview** activities. This **Quick Denial** function will check the case status in WMS to ensure that it is in either Application (AP), Single Issue (SI) or Active (AC) status. If the case is not in one of these statuses, a popup error message will display - **Invalid option - the case is inactive**.

The following denial reasons are available:

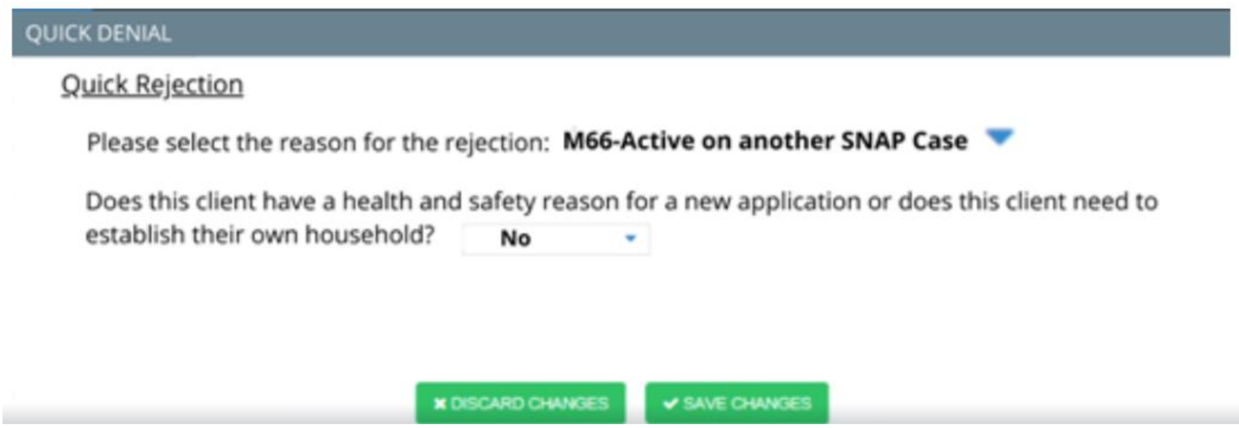
- **M66** – Active on another SNAP Case
- **M67** – Already part of another SNAP application
- **IP1** – Out of State IPV
- **N90** – IPV Traded SNAP for Firearms, Ammunitions or Explosives
- **NF1** – Purchased Illegal Drugs with SNAP – IPV (1st violation)
- **NF2** – Purchased Illegal Drugs with SNAP – IPV (2nd violation)
- **WF1** – SNAP IPV Infraction – 1st occurrence
- **WF2** – SNAP IPV Infraction – 2nd occurrence
- **WF3** – SNAP IPV Infraction – 3rd occurrence
- **F92** – Ineligible non-citizen

When the Worker selects the valid option, SPOS will navigate to the SPOS TAD to allow the Worker to process the denial or closing:

- When **M66** or **M67** is selected in the **Denial Reason** field, an additional required question appears: “Does this client have a health and safety reason for a new application or does this client need to establish their own household?”.
  - If the worker selects **Yes**, then system displays a message: “Ineligible for quick denial. The household must be interviewed, and a full determination must be made. Please click Save Changes to exit the window”.
    - After clicking on the **Save Changes** button, the Worker is returned to the last window on which they were prior to selecting **Quick Denial**.
  - If the worker selects **No** and is within the interviewer role, the SPOS TAD screen will open and the appointment status is updated as kept.

- When **F92** is selected, once the **Save Changes** button is clicked, the system checks if there are any citizens on the case or if there are eligible non-citizens on the case in AP, SI or AC status and if so, displays the following error message: "Invalid selection – Case contains eligible citizens or non-citizens."
- When the option **F92** is selected, once the **Save Changes** button is clicked, the system checks to see if the Immigration section in SPOS is incomplete. If it is found to be incomplete, system displays the following error message: "Invalid selection – Immigration section must be completed."
- If the household size is 1 and options **IP1**, **N90**, **NF1**, **NF2**, **WF1**, **WF2** or **WF3** is selected, upon click of **Save Changes**, the TAD screen will open and the appointment status will be marked as kept.
- The selected denial reason is prefilled on the TAD.

Sample screenshot



6. Warning Messages for Other Income

New warnings will be added in the Other Income section on the **Income Details** screen in the **Application, Recertification** and **Change Case Data** activities:

- When **Volunteer in Service to America (VISTA)** income is selected in Other Income, a warning will appear:
  - VISTA earnings for persons receiving SNAP benefits prior to joining the program are exempt and must not be budgeted. This income exemption does not apply to persons who apply for SNAP benefits after joining VISTA.
- When **Adoption Subsidy** income is selected in Other Income, a warning will appear:
  - Any non-normal living expenses are exempt and should be deducted from gross amount.
- When **non-recurring lump sum payments** are selected in Other Income, a warning will appear:
  - Non-recurring lump sum payments are exempt and should not be budgeted.

7. Prevent entry of certain unearned incomes for children

New business rules in the **Income Details** section will help prevent user errors:

- Prevent the worker from adding worker's compensation income for anyone under the age of 14.
- Prevent the worker from adding railroad benefits, retirement benefits, pension income, or veteran's benefits for anyone under the age of 18.
- Prevent the worker from adding alimony for anyone under the age of 16.

8. Prevent entry of mistaken start date for incomes

If the start date for any client-reported income is earlier than the person's date of birth an error message displays: "[Client Name] - [Income Type] - Income start date is earlier than the date of birth."

Example: John Doe - Employed - Income start date is earlier than the date of birth.

9. Verification Widget Rule for LDSS-3151 (Change Report) in Change Case Data

A new rule will run in the **Change Case Data** activity to require review of the **LDSS-3151** when it is present. If the Worker does not review the form, a red error message will display:

- The LDSS-3151 Change Report in the **Other Docs** tab of the **Verification Widget** must be reviewed before proceeding with the action.

10. Client Attestation for Newborn Children of US Citizens

In the **Individual Docs** screen, the **Documentation** field for Citizenship will be preset to Client Attestation for newborn children of US Citizens.

11. Residence Verification with Active Medicaid (MA) case

When SPOS finds a match based on a Social Security Number match that there is an active MA case, the Residence factor will be preset to **Existing Documents** and the document type **Match – Active MA** residence for SNAP will be selected automatically in the Individual Docs screen.

12. Warnings for Rent and Medical Expense Changes in Change Case Data

New warnings in the **Interview Review** screen will inform the Worker when changes in expenses may not need to be processed:

- For a Simplified Change Reporter (6 month reporter), if there is a decrease in the expense, a new warning will appear:
  - Decreases in rent without a move, childcare, and dependent care expenses should not be processed until the next recertification period. You must enter a detailed comment indicating the expense type(s) and new amount(s) reported for the next recertification period.
- For a Simplified Change Reporter (6 month reporter) or a Change Reporter (10 day reporter), if there is a decrease in the medical expenses for the case, a new warning will appear:
  - Decreases in medical expenses should not be processed until the next recertification period. You must enter a detailed comment indicating the expense type(s) and new amount(s) reported for the next recertification period.

13. New Business Rules for Child Support Expenses in Case Changes

A warning will be displayed in the **Other Expenses** window when a child support expense is entered, and that expense change is lower than $100.

- Changes in legally obligated child support expenses that do not change by more than $100 and are not reported via the OCSS Child Support Expense match should not be processed until the next recertification or periodic report. You must enter a detailed comment indicating the expense type and new amount.

14. Removal of Client Services Screen

The **Client Services** screen will be removed. All reasonable accommodations are displayed in the **Overview** screen in the **Reasonable Accommodations** section.

Attachment E

Streamlined POS Release Notes

Version 4.2, Summer 2021

These Release Notes contain descriptions of changes and fixes in the Streamlined Paperless Office System (SPOS) release 4.2. These and prior Release Notes also be found on the HRA Intranet at http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

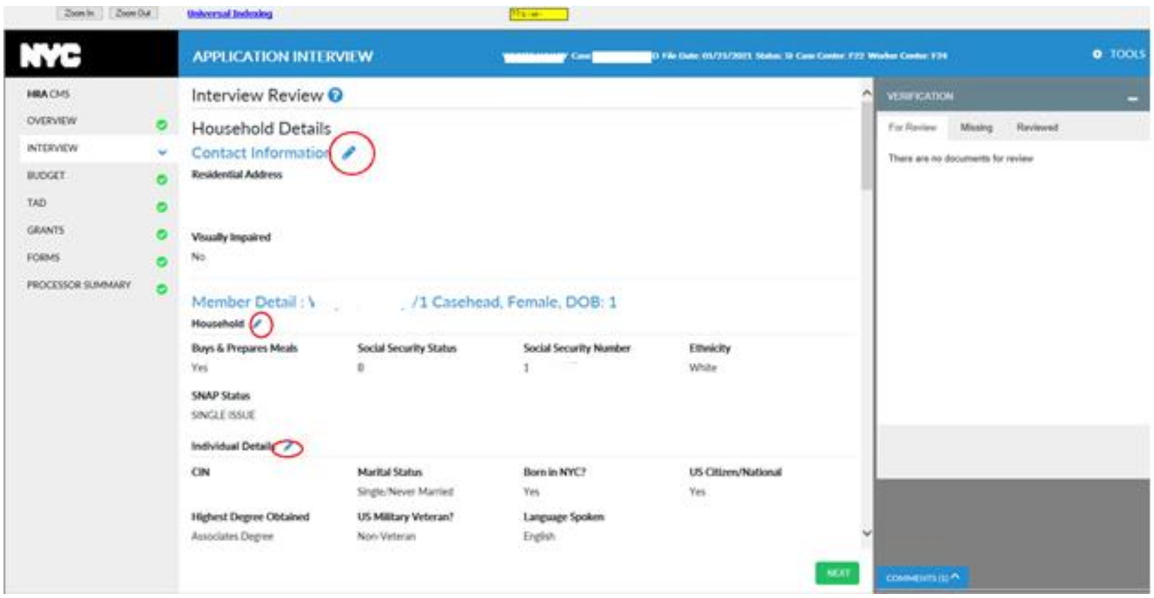
Table of Contents

1. Document Objective

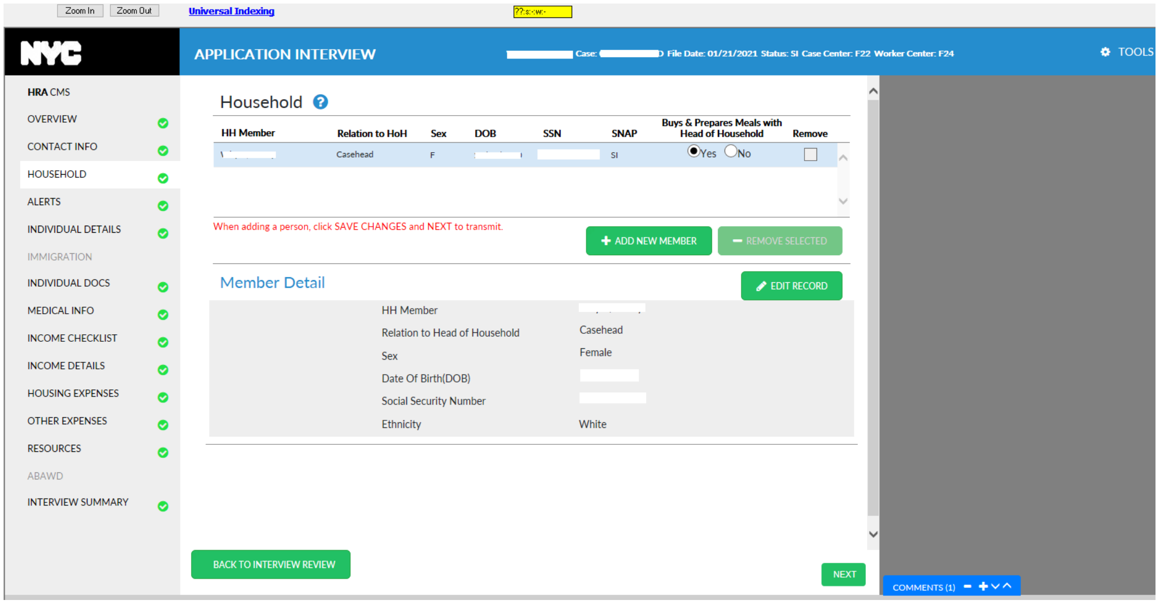
The objective of this document is to provide context for the Worker within Streamlined POS on how to access and use the editable interview screens to make changes on the case.

2. Editable Interview Access from Interview Review screen

- To access the editable interview, click on a pencil icon in any main section of the **Interview Review**, such as for example **Household Details**.



- Clicking on any of the pencil icons will bring you to that section in editable interview mode. Example clicking the pencil next to Household brings you into editable interview mode onto the **Household** screen.



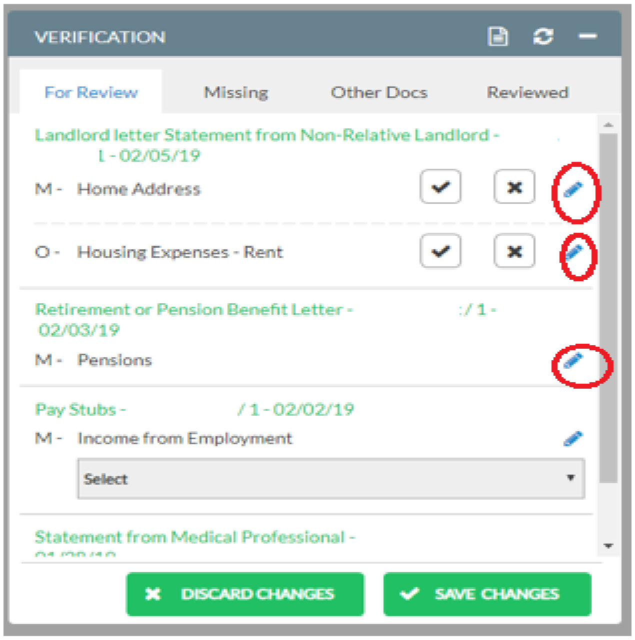
Reminder

- If making updates on the **Household** screen, click the **Edit Record** button. When the details open, click **Save Changes** when done updating information. Click **Next** to transmit to the Welfare Management System (WMS) when adding an individual to an application or active case, changing the address for an application case or when completing demographic changes on an application case. Click the **Back to Interview Review** button to return to processor mode.

3. Editable Interview Access from the Verification Widget

The **Editable Interview** can also be accessed through the pencil icons that are available throughout the Verification widget. The pencil icon is context-sensitive and will take you to the respective section/question where that document would be applicable.

For details on using the verification widget see Streamline POS 3.2 Release notes: https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=7ceb949e-29ff-4560-9bb7-ab6f535154ff&CategoryId=31&VersionDate=5%2f31%2f2019+3%3a45%3a07+PM&FileType=pdf



4. Editable Interview Sections

The sections that appear in the **Editable Interview** mode are as follows:

- Overview
- Contact Info
- Household
- Alerts
- Individual Details
- Immigration (only enables when there are non-citizens on the case)
- Individual Docs
- Medical Information
- Income Checklist
- Income Details
- Housing Expenses
- Other Expenses
- Resources
- Able-Bodied Adults Without Dependents (ABAWD) (at the time of publication, this screen is disabled due to statewide waiver)
- Interview Summary

5. Screen Layout

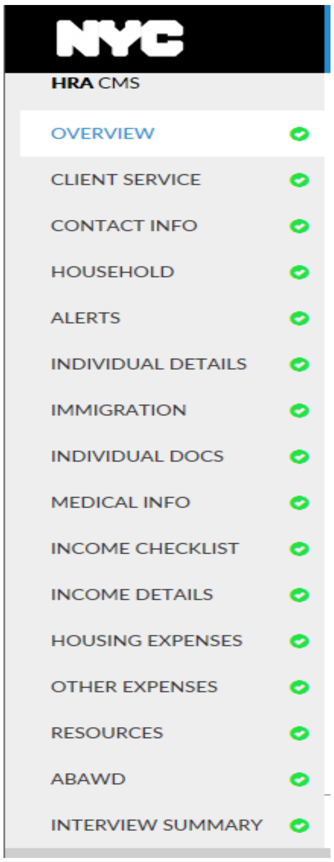
The screen layout in **Editable Interview** mode is similar to what you see in the processor mode. The blue header bar across the top is the same, the **Tools** menu is also the same. Context sensitive help is also available in the **Editable Interview** mode by clicking on the **Blue Question Mark** icons.

The 3 primary sections of the screen are:

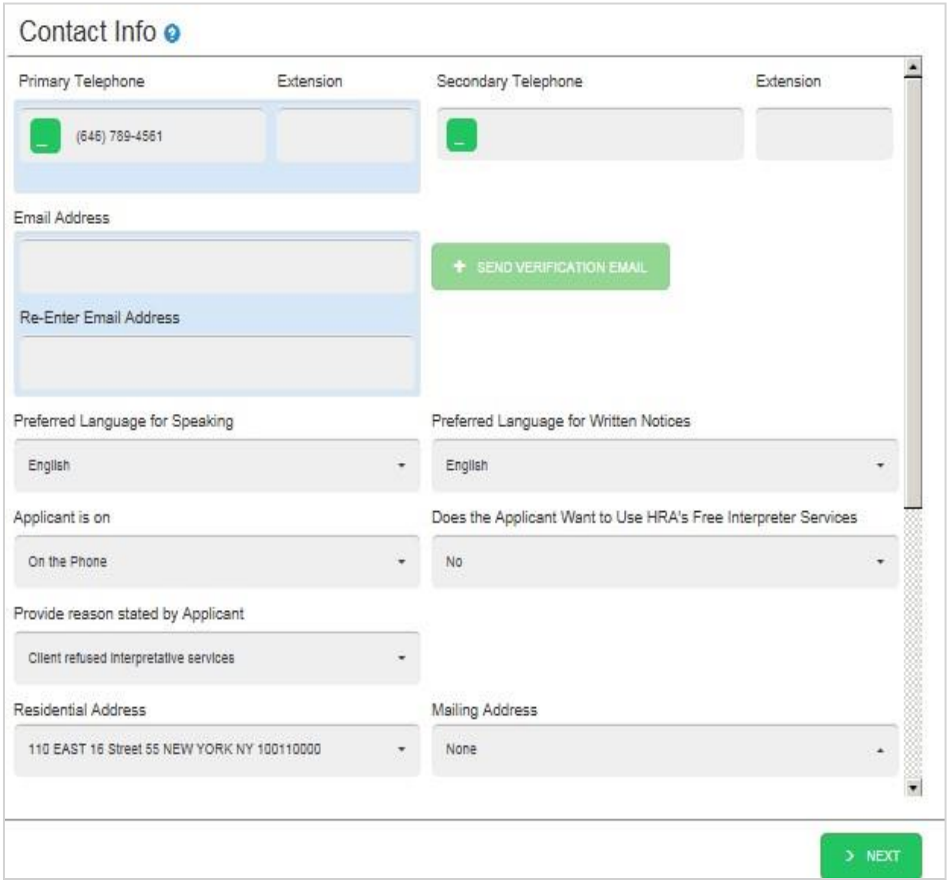
- **Navigation** bar on the left side, which now expands to the full interview sections.
- **Main Data Entry** section in the center, where the Worker will make updates or add information.

- **Right Side Panel**, where warnings, error messages, informational alerts, and the Comments widget reside. Depending upon the data fields being edited or entered, a detail entry panel may also open on this right side area.

Navigation Bar
In the editable interview mode, the Navigation Bar allows the user to go directly to the desired interview sections.

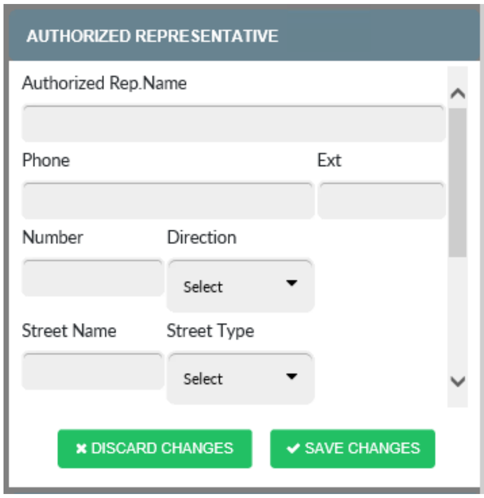


Main Data Entry
This center panel is where the user types in information.



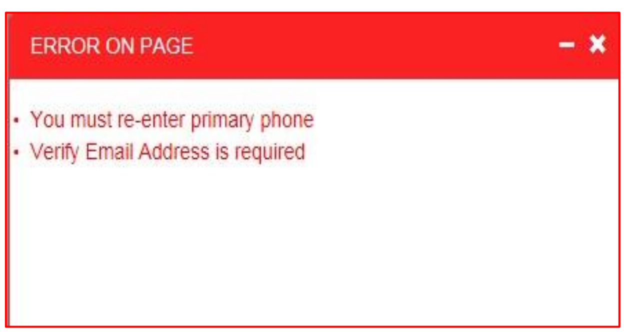
Right Side Panel
This panel displays alerts, warnings and errors for interview sections. The right-side panel can also open detail entry panels for certain fields – for example, residential address, or mailing address. The right-side panel also may show clearances or matches depending upon the section of the interview the user is currently in. At the bottom right is the **Comments** widget.

Sample Detail Entry Panel
The information displayed in this panel is triggered by an entry in the interview. For example, in the **Contact Info** section, if **Enter/Edit** is selected in the **Authorized Representative** field then the **Detail Entry Panel** will open on the right side of the display area

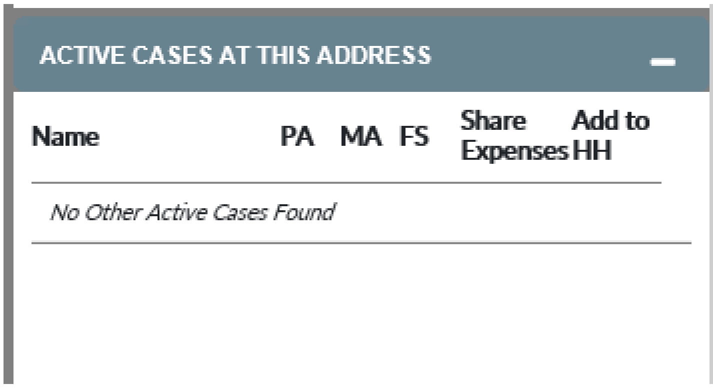


Comments
This panel is displayed in each section as a tab on the bottom right side of the screen. All comments for the case are entered in this panel.

Sample error message



Sample of WMS clearance



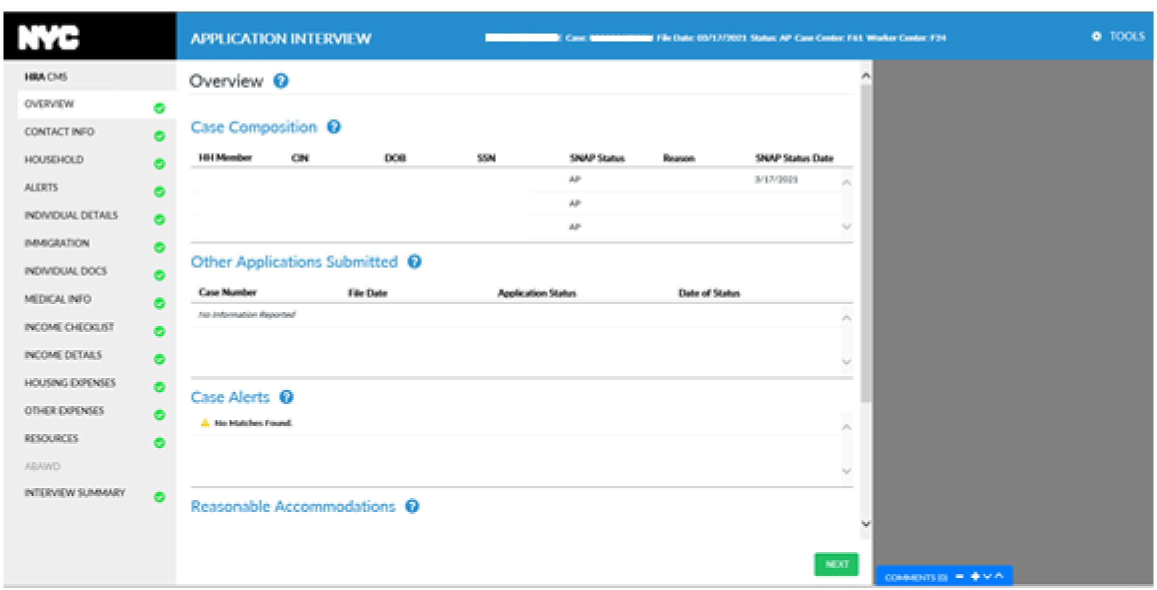
6. Section: Overview

This is the first section providing a *read-only* Overview of the case, including household members, various relevant alerts and available documentation.

The following information is displayed on this section:

- Case Composition
- Other Applications Submitted
- Case Alerts-displays alerts such as matches found
- Reasonable Accommodations
- Event log

Note: Other sections may appear in **Overview** depending upon the activity being opened or circumstances of the case. For example, if doing an error correction activity, there will be an **Error Correction** section displayed in the **Overview** which shows the WMS errors. If the action was returned to a Worker by a Supervisor, there will be a **Supervisor Return** section showing the disapprovals in the **Overview**.



Sample of Error Correction section

Error Correction

Error Number	Date of Error	Error Item number	Household Member / Line	Error Description	Additional Information
E1200	01/29/2018	145		Income source is not compatible	Income source is not compatible with SSI individual

For more details on Error correction data shown in the editable interview mode please see Streamline POS 3.2 release notes
https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=7ceb949e-29ff-4560-9bb7-ab6f535154ff&CategoryId=31&VersionDate=5%2f31%2f2019+3%3a45%3a07+PM&FileType=pdf

Sample of Supervisor Return section

Supervisor Return

Section / Question	Household Member / Line	Supervisor / Disapproval Date	Disapproval Reason and Comment
Household Details	a / 2	02/15/2018	Invalid Social Security Number - Social Security Number is incorrect. Please correct as document seen in viewer.
Household Details	:/ 1	02/15/2018	Social Security validation is incorrect - Update Social Security to present.
Income Details	:/ 1	02/15/2018	Inaccurate working hours - Client works weekly. So please correct the working hours.

For more details on Supervisor Return data shown in the editable interview mode please see Streamline POS 3.2 release notes:

https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=7ceb949e-29ff-4560-9bb7-ab6f535154ff&CategoryId=31&VersionDate=5%2f31%2f2019+3%3a45%3a07+PM&FileType=pdf

7. Section: Contact Info

The **Contact Info** screen contains the applicant/participant's contact information. The information in these fields can be edited by clicking into the text fields.

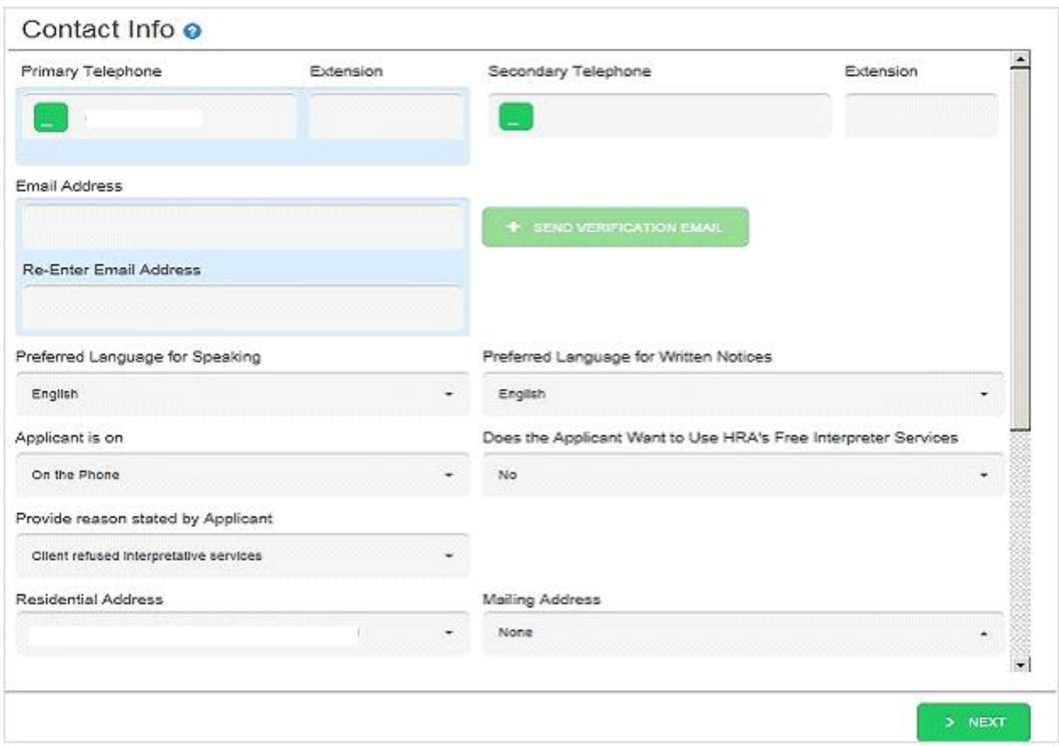
- Click the **Save Changes** button when finished when making the following edits:

- **Active Cases at this Address** panel on the right shows WMS address lookup results, if any active cases are found at this address**.**
- **Error on page** message panel on right appears if required fields have been missed.
- **Detail entry** panels on the right appear if editing or entering a residential address, mailing address, or authorized representative information.

The following information is displayed/can be edited in this section:

- Primary and Secondary Telephone

- Email Address
- Preferred Language for Speaking and Written Notices
- Do you prefer to go by a name other than your legal name?
- Do you have preferred title?
- What pronoun would you like us to use for you?
- Applicant is on- Location of applicant/participant during interview.
- Does the Applicant want HRA's Free Interpreter Services?
- Provide reason stated by Applicant/Participant – refusal reasons for HRA's Free Interpreter Services.
- Residential and/or Mailing Addresses.
- Advocate Address
- Authorized Representative
- Enrolled in Paperless Notices – pre-filled via Access New York City (ANYC).
- Block Access to this Case in ANYC - pre-filled via ANYC.
- Blind or seriously visually impaired – checkbox, if checked will open the Alternative Format for Written Notices field which has options of Audio CD, Braille, Data CD, Large Print.
- Notification Preferences
- Text Phone and Alternate Text Number



- You must click **Save Changes** on any **Detail Entry Panels**. Click **Save Changes** at the bottom of the main center panel. Click **Back to Interview Review** if done making edits to the **Interview** data to return to processor mode.

8. Section: Household

The **Household** screen displays the household members' demographics, and the WMS clearance for any individuals from past cases. All information can be edited by clicking in the text fields/ drop downs.

You can add other members to the case by clicking Add Member. **Please note that when making changes on the Household screen, it is critical to click Save Changes and Next in order for your updates to be transmitted to WMS**.

The following information is displayed in this section:

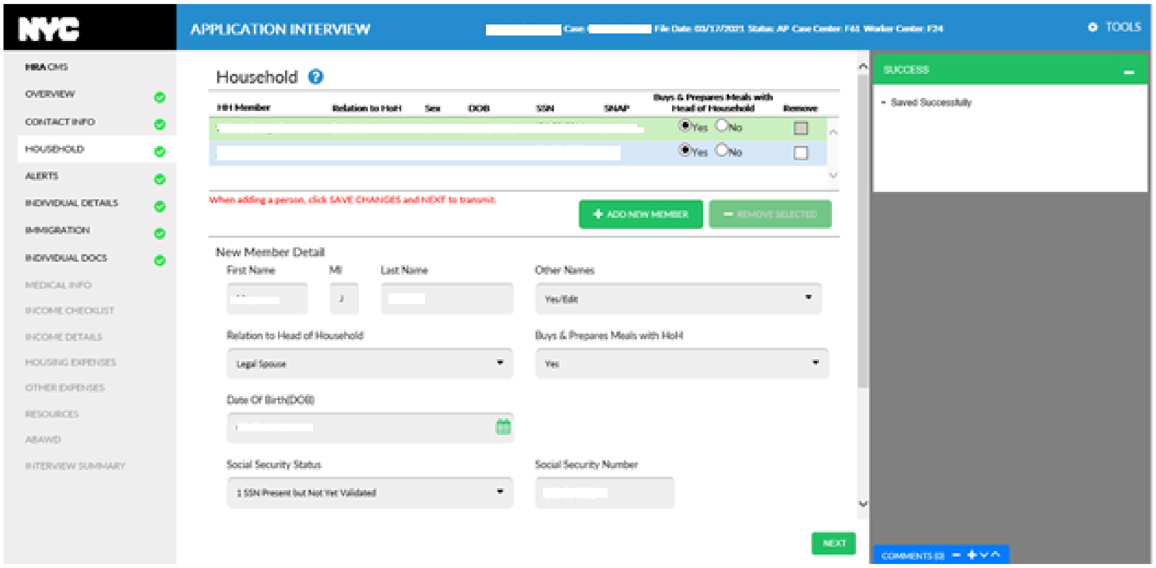
- Household (HH) Member (Last Name, First Name, Middle Initial)
- Relationship to Head of Household (HoH)
- Sex
- DOB
- FS – Status
- Buys & Prepares Meals with Head of Household
- Remove

Member Detail- read only by default

- Name- Relationship to HoH
- Sex
- DOB
- Social Security #
- Ethnicity

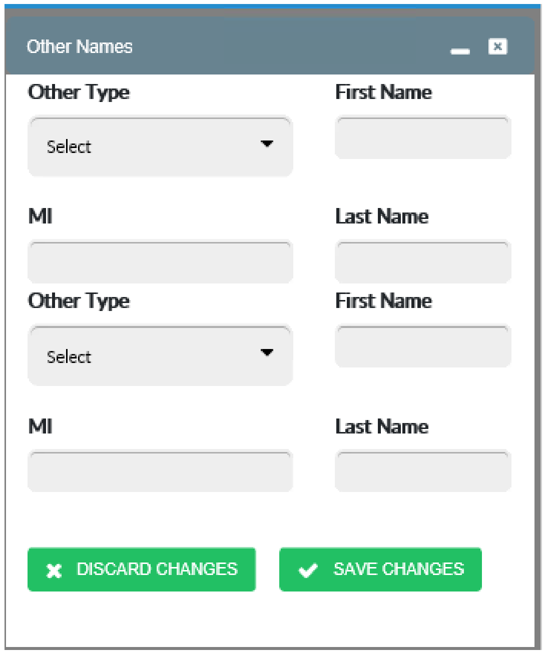
Member Detail- edit mode – must click Edit Record to make changes

- First Name
- Middle Initial (MI)
- Last name
- Other Names
- Relationship to HoH (Head of Household)
- Buys and prepares Meals with HoH (Head of Household)
- DOB
- Social Security status
- Social security Number
- Sex
- Ethnicity

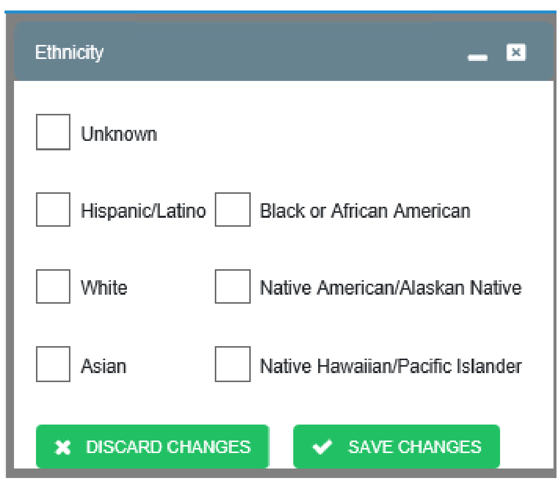


Add New Member on Household screen

- To add an individual to the case, click the **Add New Member** button to display a blank **Member Detail**.
- An individual can also be added from the **Associated Individuals from Past Cases** panel. To add individuals from the **Associated Individuals from Past Cases**, place a check mark in the **Add to Household** check box next to the person you want to add and click the **Add to Household** button.
- If using the **Add New Member** button, type the **First, MI** and **Last** name of the person in the corresponding fields.
- To enter **Other Names** click **Yes/Edit** in the **Other Names** dropdown field to display the **Other Names Detail Data Entry** panel. Enter up to two **Other Names**.
- Select the **Other Type** of name (Maiden, Alias) from the drop-down list.
- Enter the **First**, **MI** and **Last Name** of the person in the corresponding fields.
- Click the **Save Changes** button in the **Other Names** panel to save data, otherwise click the **Discard Changes** button.
- In the **Relationship to Head of Household** field select an option from the drop-down list.
- Enter the **Date of Birth** by entering the date or selecting it from the **Calendar** icon.
- **Social Security Number Status** – (only visible in edit mode) Select one of the options listed in the drop-down list.
- **Social Security Number** – Enter the Social Security Number (SSN) in the text field if it is available.
- Date of SSN application – can be entered only if the “SSN has been applied for, but is not yet available” was selected from the **Social Security Number Status** drop down list.



- **Sex** - Select one of the options listed in the drop-down list.
- **Ethnicity** – To open the **Ethnicity Detail Entry** panel, click on **Yes/Edit** in the dropdown to display the **Ethnicity** detail data entry panel on the right side. Click the **Save Changes** button to save your ethnicity details or click the **Discard Changes** button to exit without saving**.**

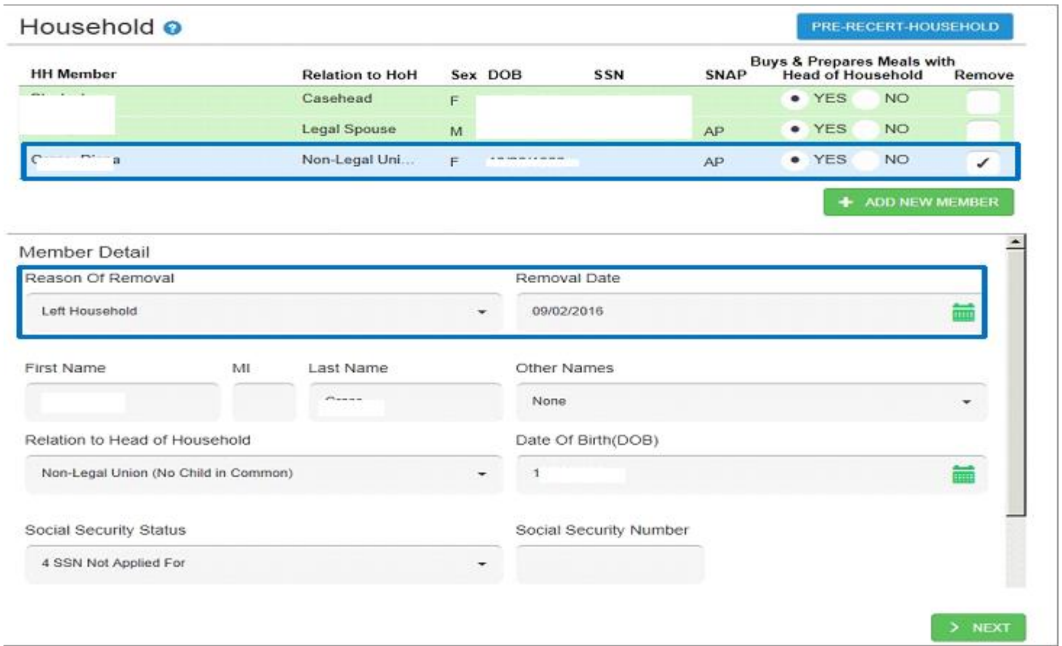


- If finished making edits to that person **click Save Changes at the bottom of the main panel and Next to transmit the newly added person to WMS.** You can repeat this process to add a third person, etc. Remember you must click Save Changes on the main panel and Next to transmit the updates to WMS!!

- Click **Back to Interview Review** if done making edits to the **Interview Data** to return to processor mode

Member Detail – Removal of Individual

- Removal of an individual from within the **Household** screen is **ONLY permissible if that line has not been transmitted to WMS**. If the Worker has mistakenly added an individual to the case in the **Household** screen and has not saved it and clicked **Next**, then that person can be removed. Any data already transmitted to WMS cannot be removed from the **Household** screen. An added person, once transmitted to WMS, must be rejected from the case on the TAD.
- To remove a non-transmitted household member, place a check mark in the **Remove** column. Two new fields will display: **Reason of Removal** and **Removal Date**.
- After entering this information click on the **Remove Selected** button.



9. Section: Alerts

The **Alerts** section displays various matches found, which run before the Alerts page loads. Some examples of these matches include – SNAP Benefits Lookup, WMS Upstate Clearance, WMS Downstate Clearance, Intentional Program Violation. There is also a bulleted list of questions which are read to the applicant/participant. Some examples of information that can be collected on the **Alerts** screen are:

- Is in a special assessment situation.
- Is needed to care for a child under 6.
- Changed or quit jobs/reduced hours.

The screen is divided into two parts:

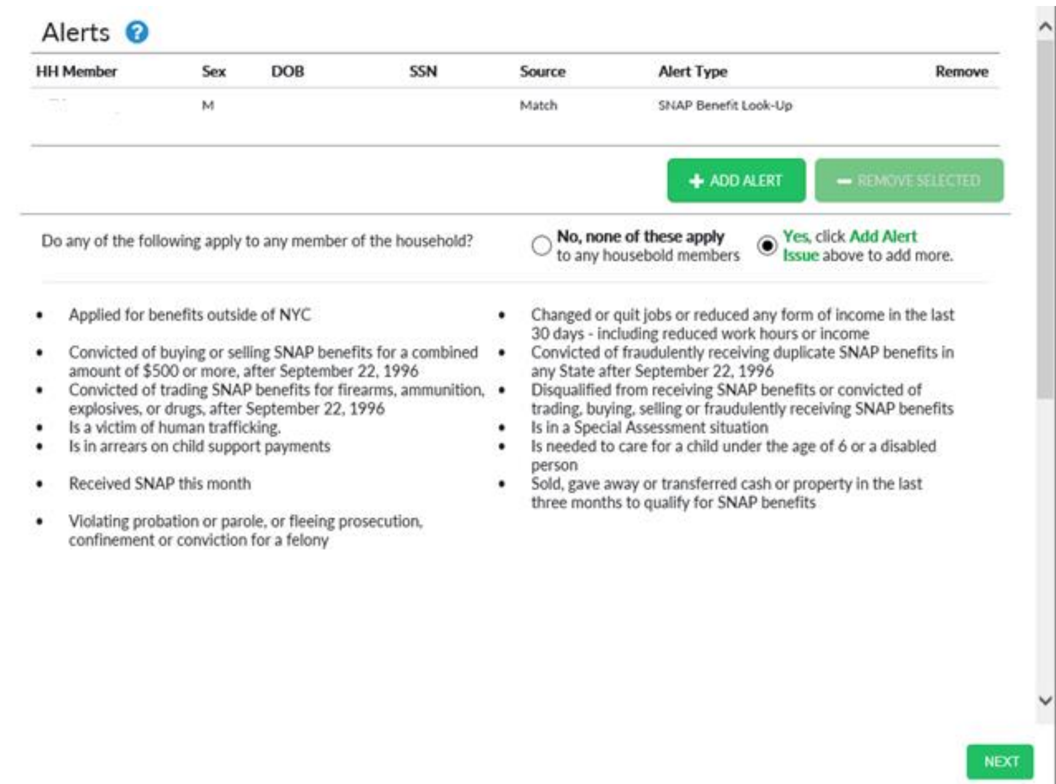
- **Alerts Grid**
- **Question Set in Alerts**

Alerts Grid

The **Alerts Grid** at the top may display household members and the Alerts reported for that individual. If any matches are found for the case, a row will exist on the grid for each match. All matches must be reviewed. They cannot be removed by the Worker. Following information is displayed on this section:

- Case member demographics (Name, sex, DOB and SSN)
- Source of Alert
- Alert Type
- Remove – Only applicant/participant reported alerts can be removed. To remove an alert, click the checkbox in the **Remove** column and click the **Remove Alert** button. If no matches are found, then there is an empty grid at the top with the message “No information reported.”

Sample Alerts screenshot



Question set in Alerts

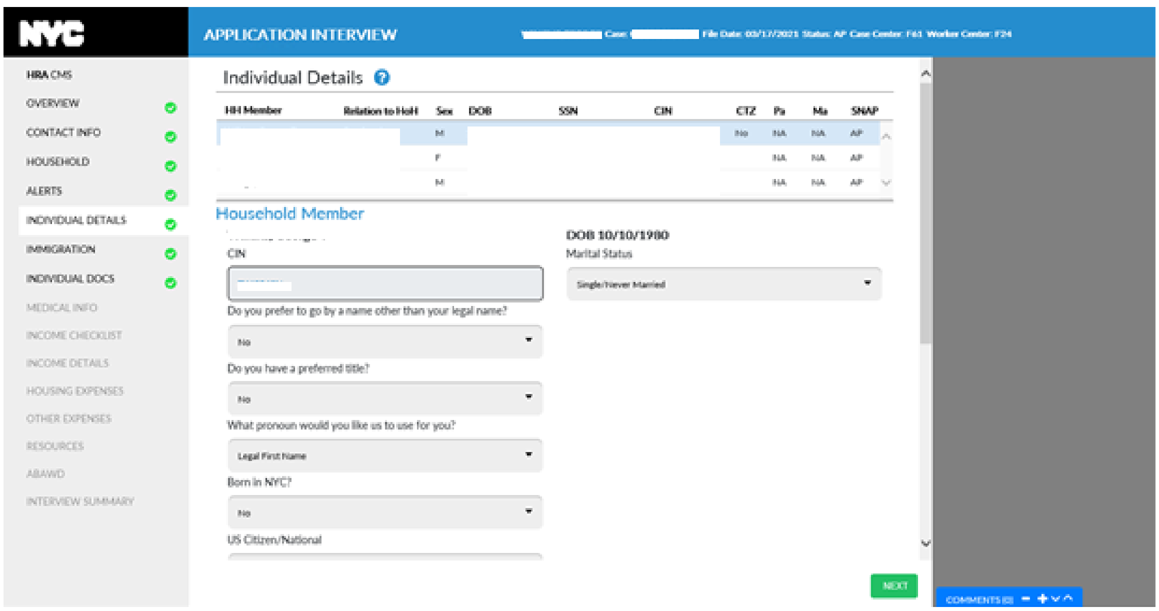
- If **Yes** is selected, click the **Add Alert** button to record information/answer questions displayed as follows in this section:

- The **New Alerts Type Detail** opens, allowing for the recording of new alerts reported by the applicant/participant.
- **Household Member** - Select the household member from the drop-down list.
- **Alert Type** - Select the alert from the drop-down list.
- Select an option from the **Documentation** drop down list.

- Select documentation options and **Save Changes** on the documentation panel.
- The appropriate data fields display on the main panel depending on the Alert type selected.
- After each field has been completed for the alert selected, click **Save Changes**. You may click **Next** to go to the next screen.
- Click **Back to Interview Review** if done making edits to the interview data to return to processor mode.

10. Section: Individual Details

The **Individual Details** section captures necessary WMS indicators for the members listed in the **Household** screen that buy and prepare meals with the case head. Those members that are closed, rejected or do not prepare and buy meals with the case head are not listed. All member information can be edited by clicking in the text fields/drop downs.



Individual Details Grid

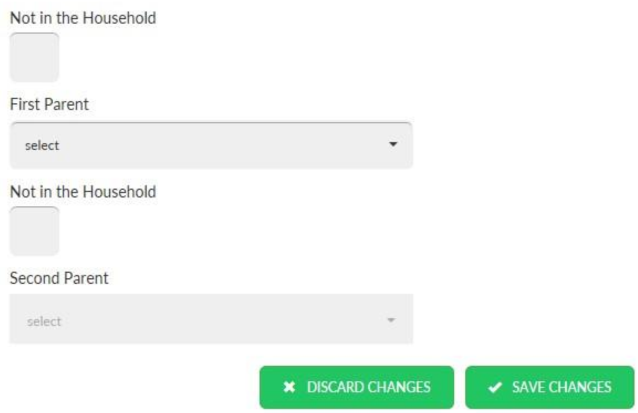
Household member's demographics, citizenship, Program Statuses and Member Detail visible upon selecting a row and allows for the editing the member information in the main panel.

- The **Individual Detail Grid** lists individuals in the household and their demographics, citizenship and Program Status:
  - HH Member
  - Relationship to Casehead
  - Sex
  - DOB (Date of Birth)
  - SSN
  - CIN
  - CTZ (Citizenship)
  - Case Status for PA, MA and SNAP

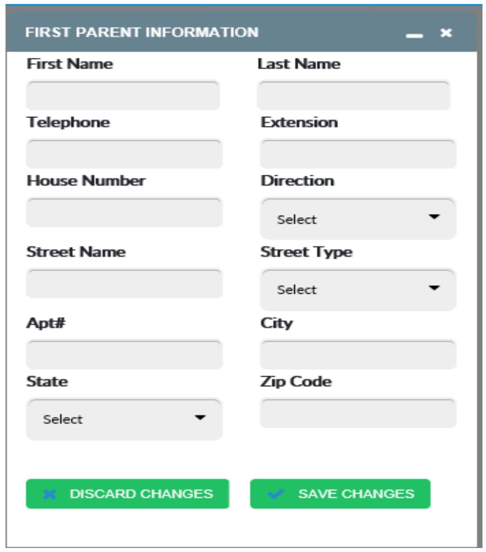
- The **Household Member** detail section:
  - CIN

  - Marital Status
  - Do you prefer to go by a name other than your legal name?
  - Do you have preferred title?
  - What pronoun would you like us to use for you?
  - Born in NYC?
  - US Citizen/ National – **If answered No, this field will trigger the Immigration flow**
  - Student Status – Note that if a student, the proper completion of the fields in the Institution Name and Student Eligibility detail entry panel that appears on the right side panel will enable the system to determine student eligibility for SNAP benefits.
  - Has Diploma/GED
  - Highest Degree obtained
  - US Military Veteran?
  - Pregnant?
  - Language Spoken

- The **First Parent** and **Second Parent** fields with **Not in the Household** checkboxes will appear for children on the case, see sample below:



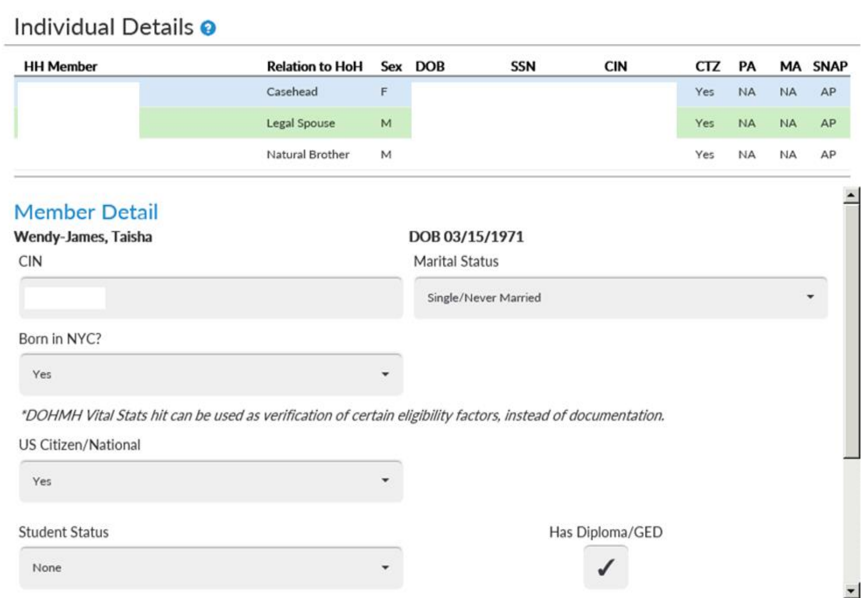
  - If the first parent (or second parent) resides in the household, select the name from the dropdown list (the same applies to the second parent).
  - If the first parent (or second parent) does not reside in the household, check the **Not in the Household** checkbox in order to open the **Detail Entry Panel** to type in the parent's information. Then click the **Save Changes** button to save data, otherwise click the **Discard Changes** button.



- Click **Save Changes** on the main panel. You must enter Individual details for each person on the case. Click the next person's row on the grid to go on to the next person. When finished, click **Save Changes**. If you wish to return to processor mode, click the **Back to Interview Review** button.

Individual details: Department of Health Vital Stats match (DOHMH Match)

This match appears only if the person was born in NYC. It can be used to verify Identity, Age and Citizenship. This match will first be seen in **Individual Details** section where there will be a message that "*****DOHMH Vital Stats hit can be used as verification of certain eligibility factors instead of documentation."



- Click **Back to Interview Review** if done making edits to the Interview Data to return to the Processor Mode.

11. Section: Immigration

The immigration flow is triggered by answering **No** to the US Citizen/National question on the **Individual Details** section of Streamline POS.

In the **Application interview**, the immigration flow opens with the 14 immigrant types displayed in the grid on the top of the page.

- The Worker answers Yes to the appropriate immigrant type based upon the documentation provided by the applicant/participant. When **Yes** is answered to an immigrant type, the details for that type opens such as Alien Number, Date Of Status, Date Physically Entered the US. This information is obtained from the documents provided by the applicant/participant. .

For certain immigrant types, there is another section called **SNAP Eligibility Details** that opens in the immigration flow if the Date of Status is less than five years. The immigrant types which open other questions if date of status is less than five years are:

- Legal Permanent Resident
- Battered
- Parolee
- At Least One Year.

The other questions that can be used to determine the non-citizen eligibility for Supplemental Nutrition Assistance Program (SNAP) are:

- If they are serving in the military.
- If they are a veteran.
- If they are currently receiving Social Security Income (SSI).
- If they have **Other Disability** (this opens a subset of further **Other Disability** questions), and the 40 quarters flow.

- **You must click Save Changes at each step to ensure proper running of business rules and ensure the opening of more questions**. If the non-citizen is able to meet one of these categories, they will be eligible for SNAP benefits.

How to add another non-citizen of the same immigrant type
Example – you have one legal permanent resident already saved in the immigration flow and need to add a second legal permanent resident.

In order for you to add a second Legal Permanent Resident on this case,

- Click on **Legal Permanent Resident** (LPR) row again – this should enable the **Add Member** button. When you get the popup message warning you that any data entered will be lost if you do not click **Save Changes**, à **Press OK to this message box will appear**.
- After clicking **OK**, you will get a new blank record so you can select second person who is an LPR from the household member dropdown and enter their details. Click the **Save Changes** button at the bottom of the page.

You should now see two rows on the top grid with a LPR one for the first person who is an LPR and another row for the person you just saved**.**

In order to properly complete the immigration flow:

- Answer **No** to all other immigrant types and the Summary row on the top grid must be clicked so that a SNAP eligibility outcome can be determined.

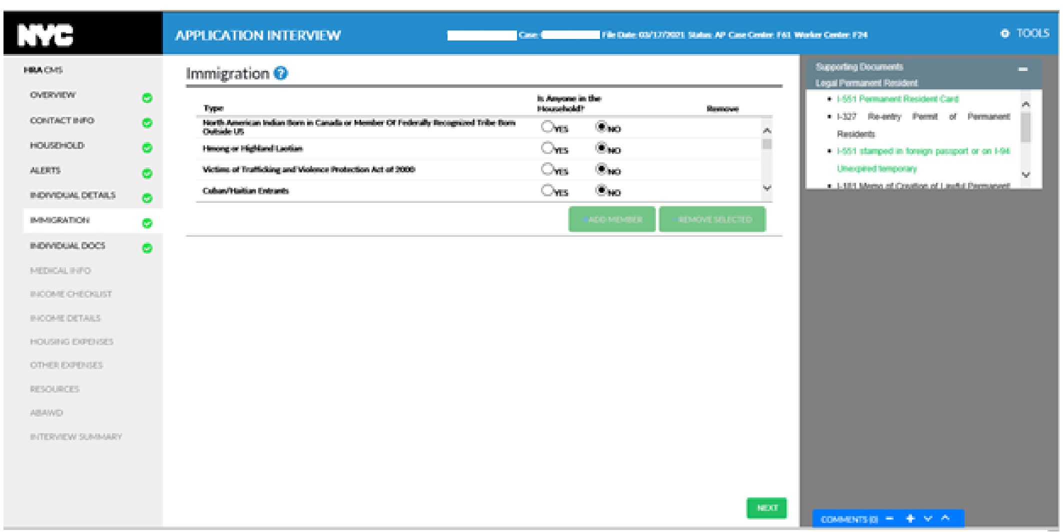
In **Recertification** or **Change Case Data**, the immigration flow will open in Re-evaluation mode. In Re-evaluation mode, the grid displayed shows each non-citizen and their current immigration information. Any non-citizen that has met a milestone or trigger will be preselected by the system for evaluation. Some examples of milestones/triggers are turning 18 years old, and reaching 5 years in status.

Newly added non-citizens are also pre-selected for evaluation.

- Click the **Evaluate Selected** button to begin and the system will enter the normal mode of the immigration flow. In normal mode you will see the 14 immigrant types on the grid at the top where selections can be made accordingly.
- A Worker may manually select a non-citizen for evaluation if their immigration status has changed. To do this, check the **Re-evaluate/Evaluate** checkbox and then click the **Evaluate Selected** button. Even if nothing has changed, all immigration information must be reviewed for each non-citizen.

For further details on the immigration flow, please see the Streamline POS Non-citizen workflow release notes at:

https://hraedocs.hra.nycnet/HRAeDocs/DocumentFunctions/DocumentDirectAccess.aspx?DocId=e6996fe9-6a43-411e-896f-26dafd405a72&CategoryId=31&VersionDate=5%2f16%2f2018+12%3a11%3a16+PM&FileType=pdf



- Click **Back to Interview Review** when finished making edits to the **Interview Data** to return to the Processor mode.

12. Section: Individual Docs

The individual docs section will pre-set the Documentation option to **Existing Documents** if any are found in the One Viewer as well as capturing the document selection for the required eligibility factors for each household member.

It is divided into: **Individual Documents Grid** and **Documentation**. Select the Documentation option from the drop down list to display the individual data entry panel.

Individual Documents Grid
The **Individual Documents Grid** lists the individuals in the household. Select a row to view the Documentation Eligibility Factors for that individual. The user must select each row on the top to obtain the document information details for each individual on the case:

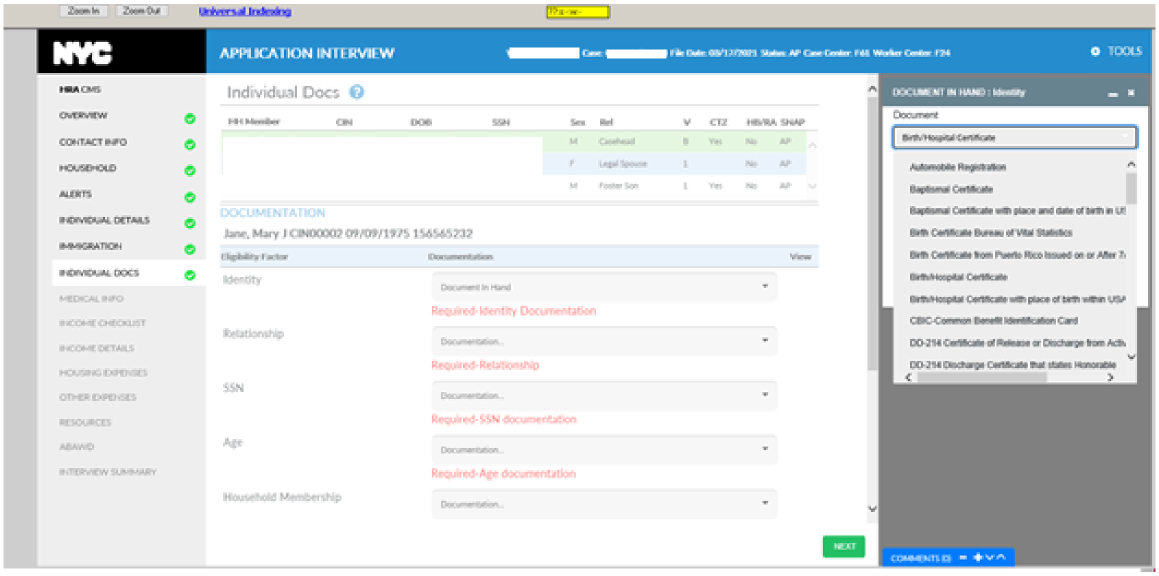
- HH Member – Household Member
- CIN – Client Identification Number
- DOB – Date of Birth
- SSN – Social Security Number
- Sex - Gender
- Rel – Relationship to Casehead
- V – SSN Validation. Hovering the cursor over the numeric code will display a tooltip with additional information.
- CTZ - Citizenship
- HB/RA – Homebound/Reasonable Accommodation

Individual Docs

HH Member	CIN	DOB	SSN	Sex	Rel	V	CTZ	HB/RA	SNAP
				M	Casehead	B	Yes	No	AP
				F	Legal Spouse	1		No	AP
				M	Foster Son	1	Yes	No	AP

Documentation for Eligibility Factors for each case member
Documentation – Displays the name, Client Identification Number (CIN), DOB and Social Security Number (SSN) of the individual selected in the grid and consists of three columns: **Eligibility Factor**, **Documentation**, and **View**. The eligibility factors trigger the Documentation drop down list when selected. The eligibility factors are:

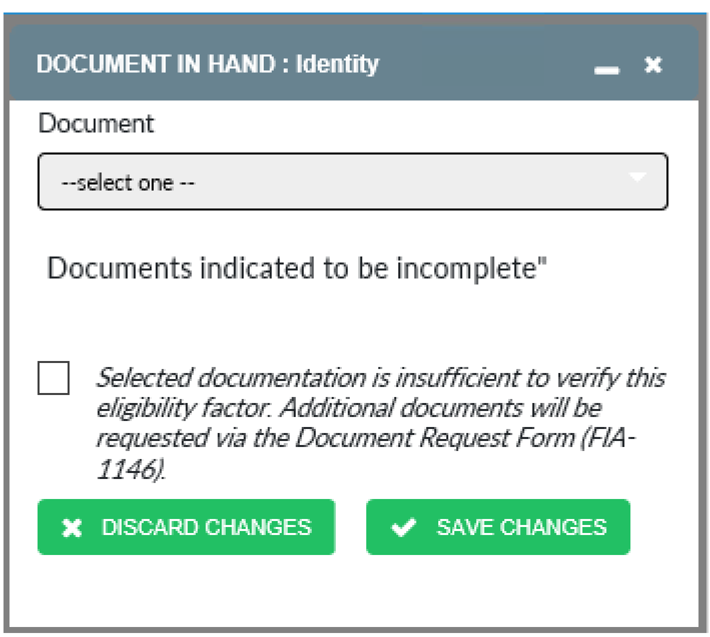
- Identity
- Relationship
- SSN
- Age
- Household Membership
- Citizenship
- Student Status (if applicable)
- Veteran Status (if applicable)
- Residence

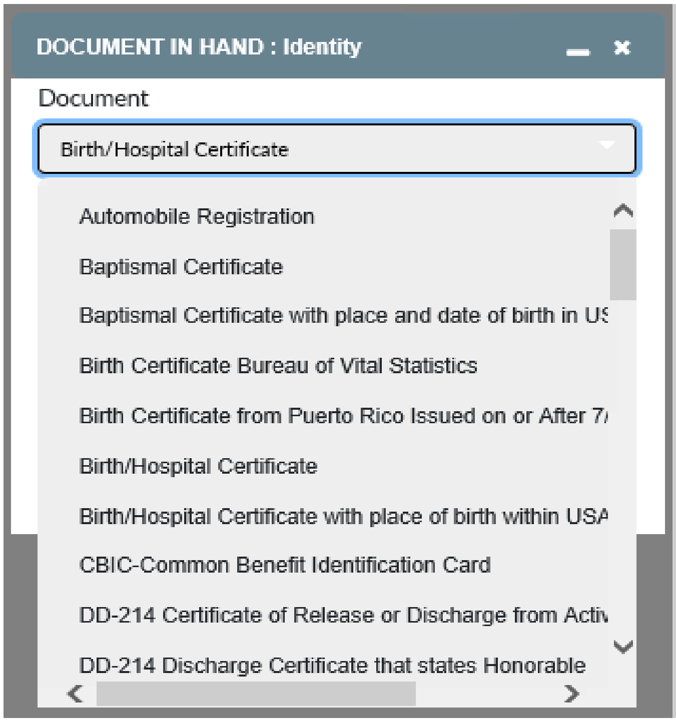


The **Documentation** options are specific to that eligibility factor. The drop-down list includes the following:

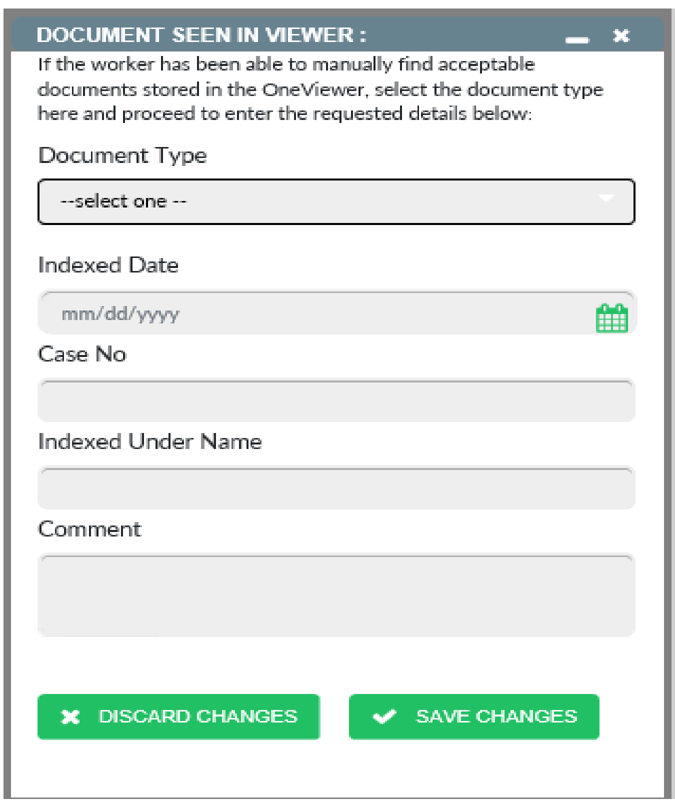
- **Document in Hand** – Selecting **Document in Hand** from the drop-down list, opens a Detail Data Entry Panel on the right side of screen:

  a. Select the specific document provided from the drop-down menu.
  b. If the document selected is not sufficient enough to verify the eligibility factor, the interviewer can click the checkbox next to: **Selected document is insufficient to verify the eligibility factor. Additional documents will be requested via the document request form** You Must Submit Documents For Your SNAP Case! **(FIA-1146)**.
  c. To save any changes made, click the **Save Changes** button; otherwise click the **Discard** button.

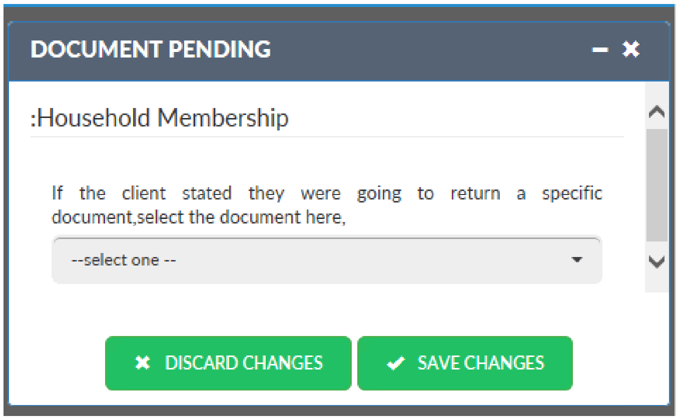




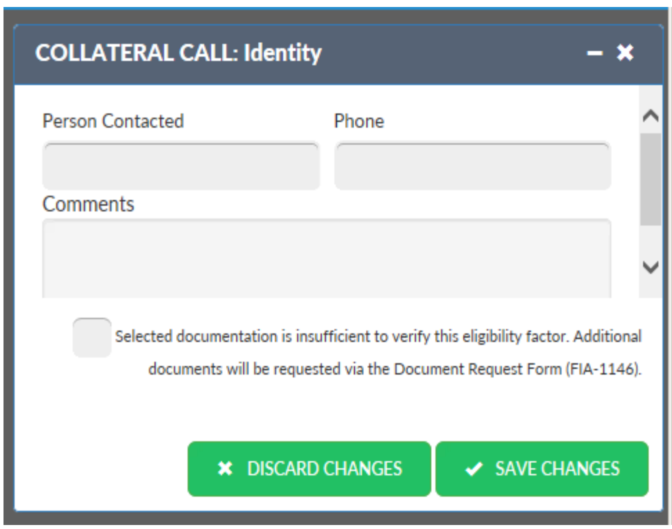
- **Document Seen in Viewer** - Opens the Detail Data Entry panel on the right side of screen.



- **Document Pending**- Opens the Detail panel on the right side of screen.



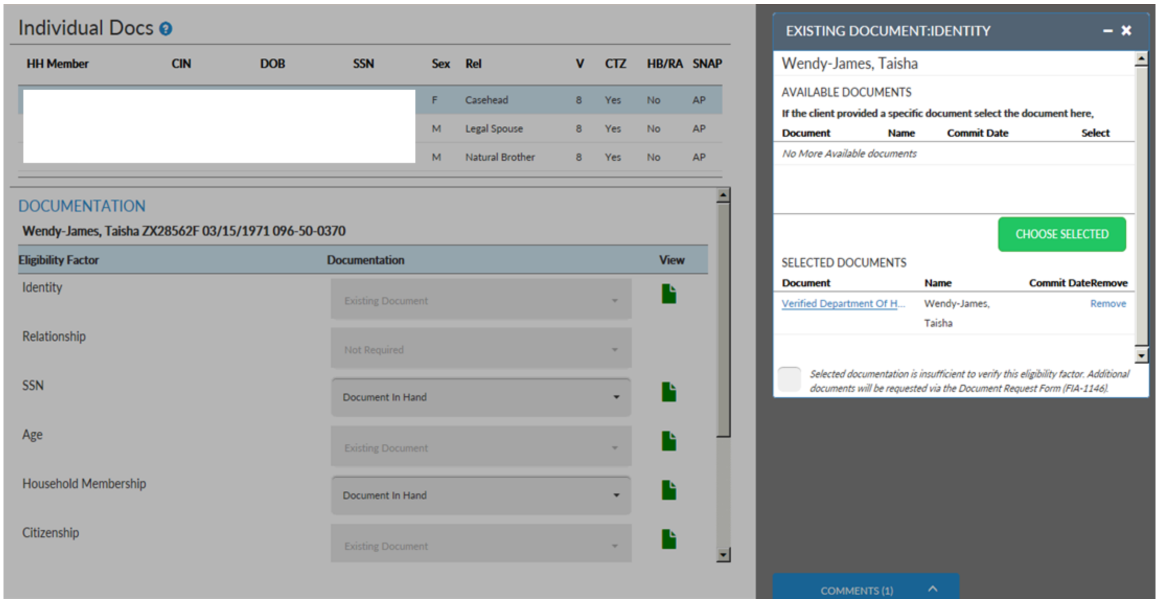
- **Collateral Call (if applicable) –** In the **Collateral Call Detail Entry** panel, enter the name of the Person Contacted, their Phone Number and in the Comments type in the verification information supplied by the person contacted. Click **Save Changes** on the panel or **Discard Changes** to cancel.



- **After Documentation is selected –** A green paper icon appears next to the documentation drop down to verify what verification has been selected. It appears next to **Document Pending**, **Document In Hand, Document Seen In Viewer, Collateral Call** to re-open the panel to see what documents were selected. The paper icon will also display for **Existing Documents**. This option is pre-selected by the system.
- Click **Save Changes** at the bottom of the main panel before going on to click the second person on the grid. You must address documentation for each person on the case.

Individual Docs: Department of Health Vital Stats match (DOHMH Match)
This match can also be seen in the **Individual Docs** section in the **Existing Documents** panel with a selection that reads **Verified Department of Health match**

Note: Do not click on any links that are matches – the system will hang.



- Click **Back to Interview Review** if done making edits to the interview data to return to processor mode.

Individual Docs: How to address Existing Documents

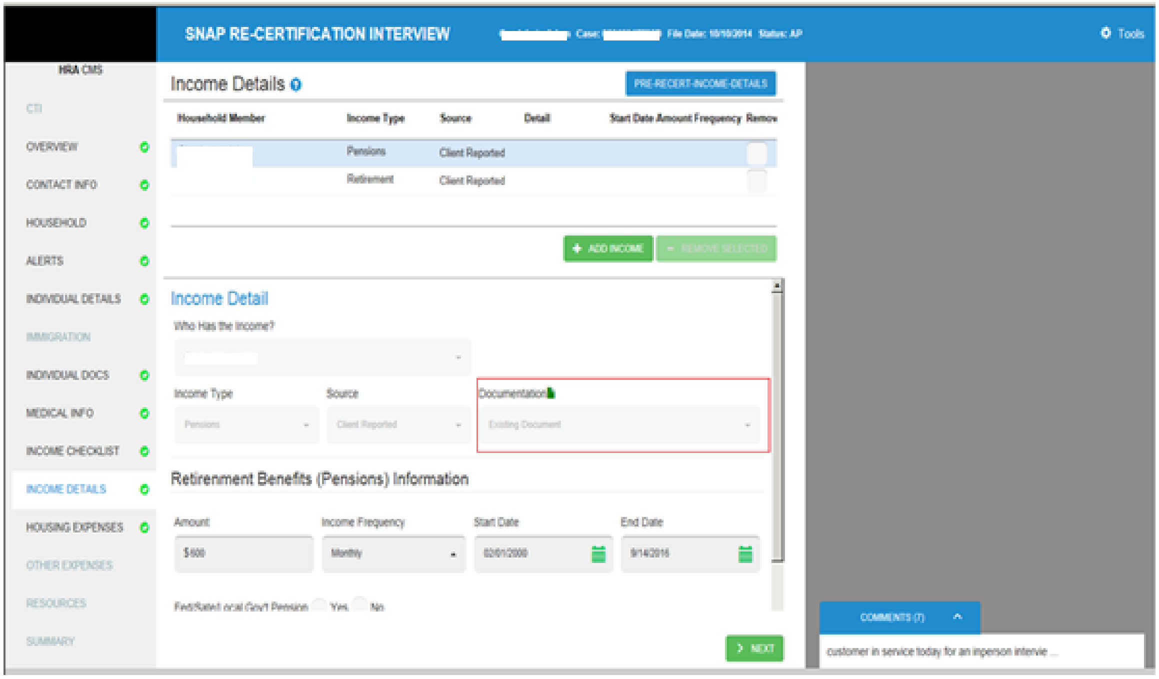
- For each of the eligibility factors where the system is showing Existing Documents, staff must click on the green paper icon to open up the **Existing Documents** panel which will then show you the documents the system found.
- Click on the hyperlink to view the document(s) that was found by the system. Once the user determines the document is good, check the **Select box** and click on the **Choose Selected** button. This will "permalink" the document to be used as verification for this eligibility factor.
- If the documents found by the system are not good enough, then check the box that says **Selected documents is insufficient to verify this eligibility factor. Additional documents will be requested via the Document Request form**.
- When finished selecting documents for a particular eligibility factor, then click on the **X** in the upper right corner of the **Existing Documents** panel in order to close it and go on to the next eligibility factor that has **Existing Documents**.
- <u>Once the process is completed for the first person on the case, click **Save Changes** at the bottom of the page. Click the second person on the case and repeat the whole process again. Remember to click **Save** Changes on each person before going to the next person.</u>

When you get through the process for the last person on the case, click **Save changes** on the main panel before clicking the **Next** button. Existing Documents can also appear in other sections of the interview.

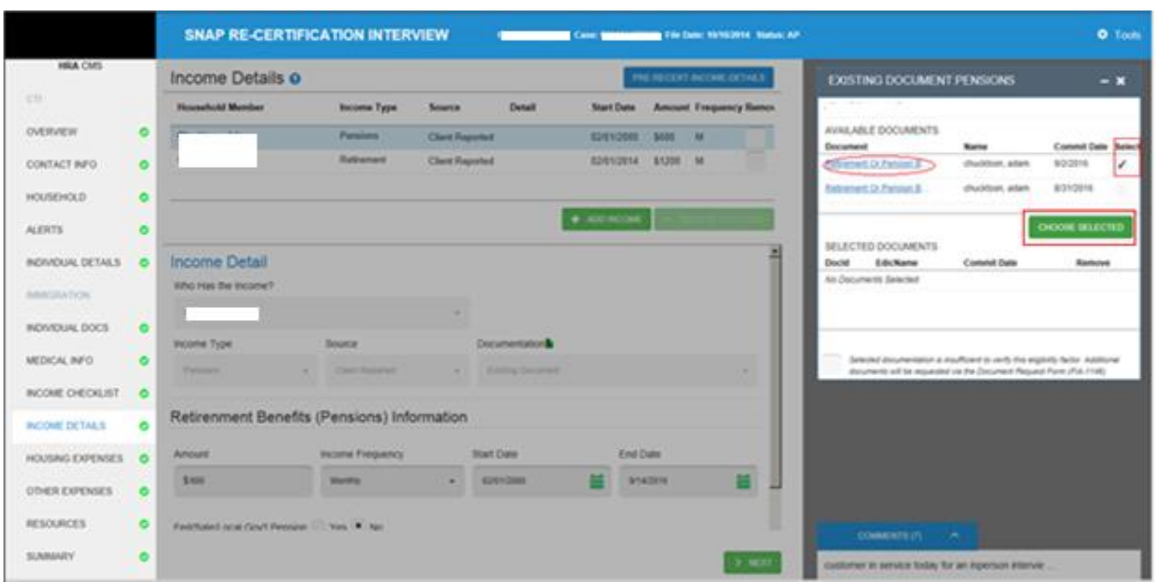
Detailed Example of Existing documents found by Streamline POS

This process should be followed for each eligibility factor or question where the system found Existing Documents.

- Click on the green icon to open the side panel that will show the documents found by the system.

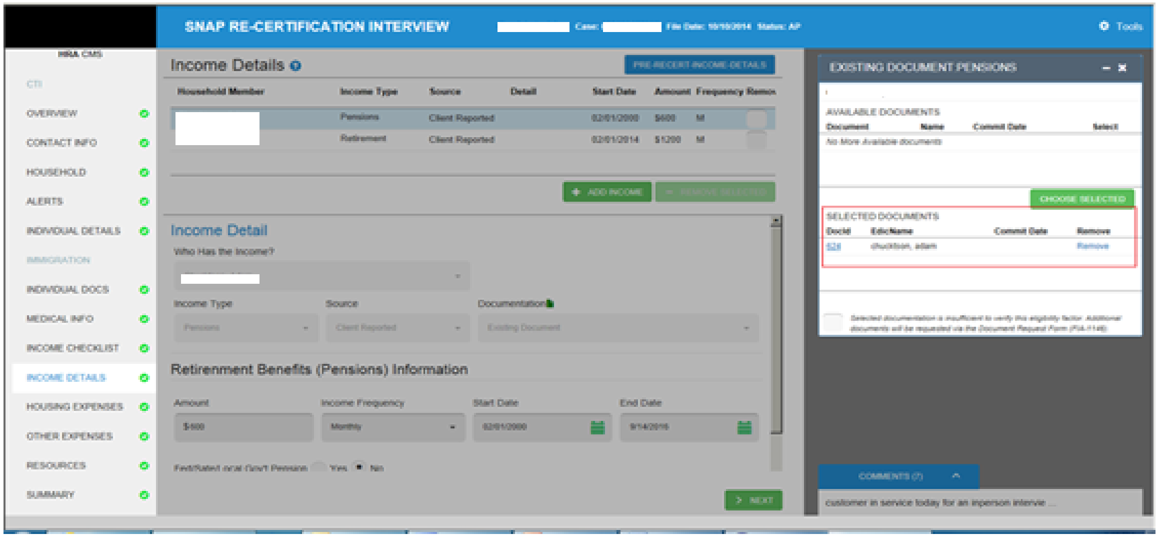


- Each document found is hyperlinked. Click on the **hyperlink** – this will open the document found by the system.

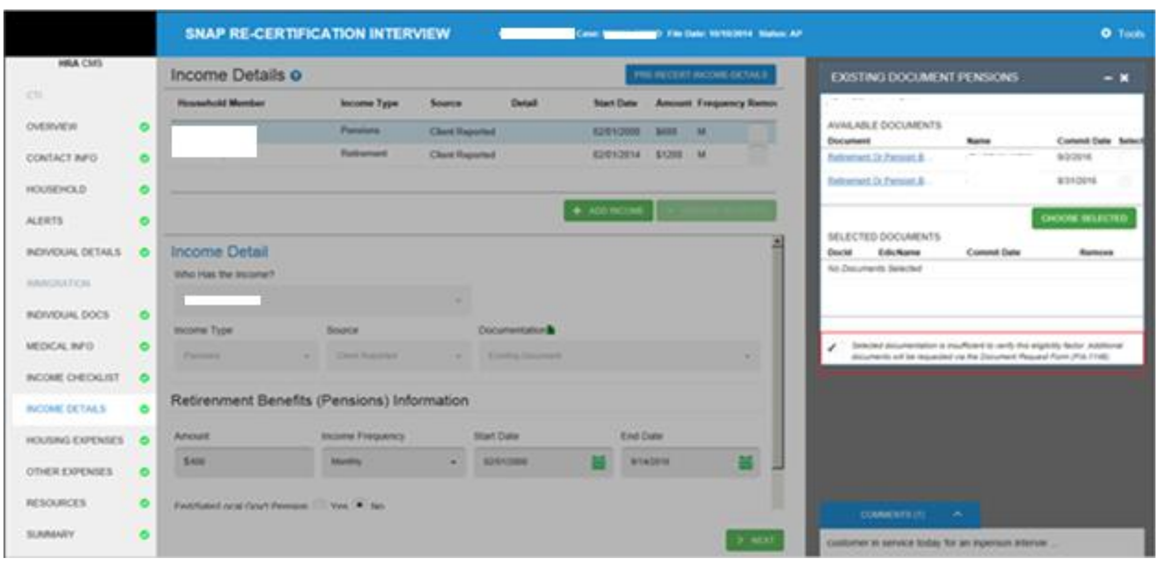


- Once you determine whether the document is good and you want to reuse it to satisfy the eligibility factor or question, then check the **Select** box and click on the **Choose Selected** button.

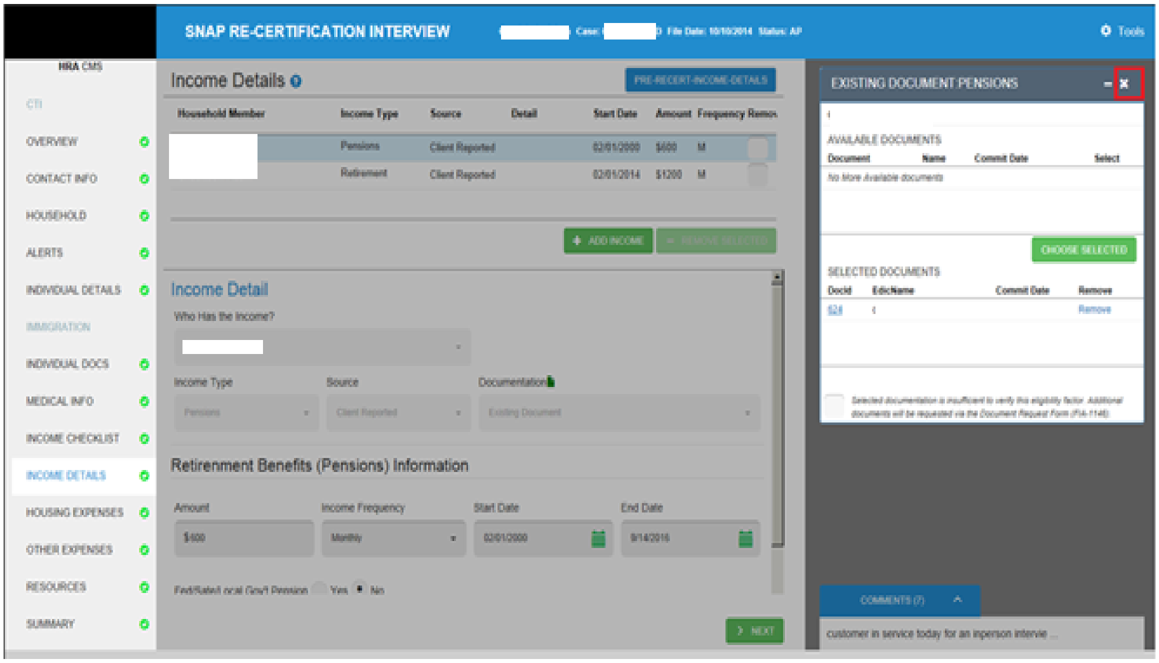
- The document you choose will become “perma linked” to that eligibility factor or question. The document chosen will appear in the **Selected Documents** portion of the panel, as shown in the screenshot below.



- After reviewing all documents found by the system, if the documents are not legible or are not good enough to reuse/satisfy the eligibility factor or question, then check the box at the bottom of the panel that says **Selected documents is insufficient to verify this eligibility factor. Additional documents will be requested via the Document Request form.** This will make that question/eligibility factor appear on the **FIA-1146**, as per the screenshot below.

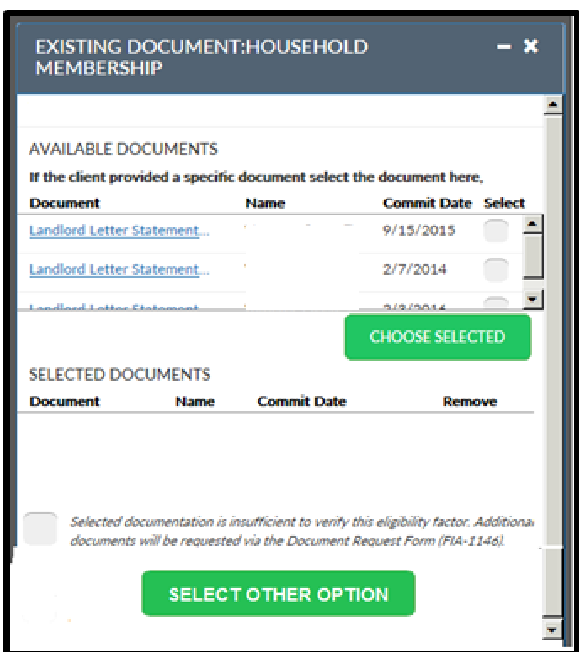


- When finished making your selections on the **Existing Document** side panel, close the panel by clicking on the **X** in the right-hand corner.



Note: In the event that the document found by the system is not for the desired person or if you want to reset the factor that has **Existing Documents**, click the **Select Other Option** button at the bottom of the panel.

- Click the **Select Other Option** button to select any valid selection from the dropdown such as **Document in hand**, **Document Seen in Viewer**, **Document Pending**, etc.



- When finished making documentation selections for the first person on the case, Click **Save Changes** at the bottom of the page.

- Go to the next person on the case by clicking the **second row** on the grid. Repeat this process for each eligibility factor which has **Existing Documents** selected.
- Remember to click **Save Changes** at the bottom of the main panel once you finish a person before clicking on the next person on the case.
- When finished going through each person (and clicking **Save Changes** on each person) then click *Next* to move to the next section of the interview. Click **Back to Interview Review** to return to Processor mode.

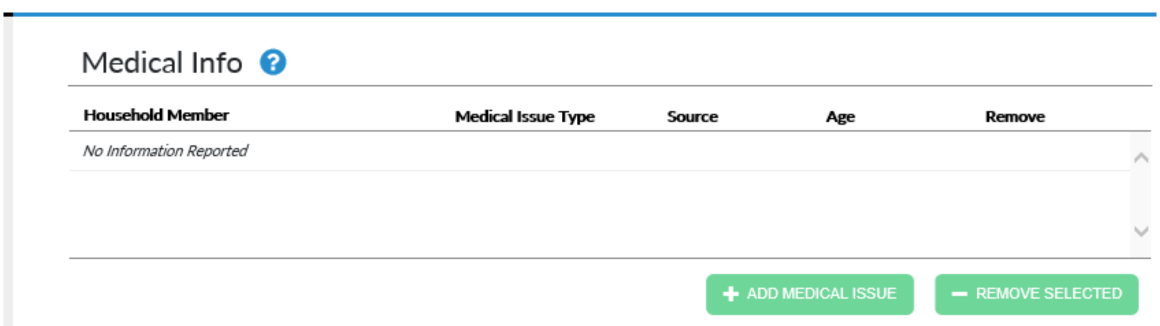
13. Section: Medical Information

This section captures medical limitations, medical issues and requests for home visit or homebound status. It is divided into two parts**: Medical Information Grid** and **Medical Issue Detail** section**.**

Medical Information Grid
The following information is displayed for any individual with medical issue:

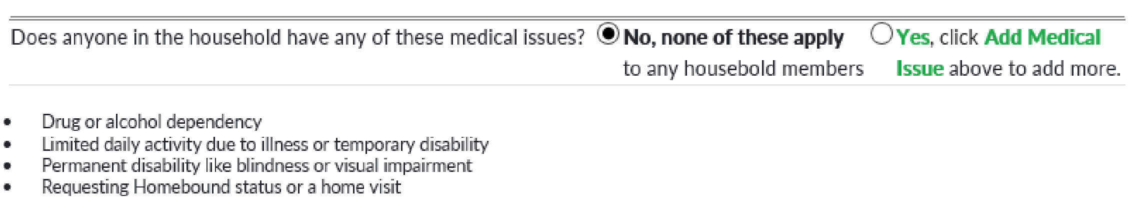
- Household Member
- Medical Issue Type- Either "Client Reported" or "In Case Record" displays
- Source
- Age
- Remove

The **Medical Information Grid** displays information if there is a medical issue for one or more individuals otherwise it will display *No Information Reported.*



- To record a medical issue answer **Yes** to the following question in the **Medical Information Grid**: "Does anyone in the household have any of these medical issues?"

If none apply, select **No, none of these apply to any household member**. If **Yes** is selected, click the **Add Medical Issue** button and the **Medical Issue Detail** view is displayed. The. **Medical Issue Detail** view is specific to medical issues being added.



- In order to add a medical issue answer **Yes** and then click the Add Medical Issue button. All information can be edited by clicking in the text fields/dropdowns. To remove the **Medical Issue**, click the checkbox in the **Remove** column and click the **Remove Selected** button.

Medical Issue Default View
The different types of medical issues are displayed under the question *"Do anyone in the household have any of these medical issues?"*

- Drug or alcohol dependency
- Limited daily activity due to illness or temporary disability
- Permanent disability like blindness or visual impairment
- Requesting Homebound status or a home visit

Note: To indicate a person is disabled, the Worker must answer **Yes** to **Medical Info**, and click the **Add Medical Issue** button. In the Details section that open, select the person, choose **Medical Issue Daily Activity Limited**, pick Disabled in the Details section, and answer all the other fields that appear in the Details section.

New Medical Issue Detail View
The **Medical Issue Detail View** allows for the recording of new medical issues reported by the applicant/participant.

- Household Member-Select the Household Member from the drop-down list.
- Medical Issue type - Select the Medical Issue from the drop-down list.
- Select an option from the Documentation drop down list.
- The appropriate data fields display depending on the option selected.
- Select **Documentation** from the drop-down list.
- Then click the **Save Changes** button to save data, otherwise click the **Discard Changes** button.
- After each field has been completed for the Medical Issue selected, click the **Next** button to go to the **Income Checklist**.
- Click **Back to Interview Review** if done making edits to the interview data to return to processor mode.

14. Section: Income Checklist

This section provides information on the types of incomes received by household members. It is divided into the following tables: **Employment Status**, **Unearned Income**, and **Other Income**. The **Employment Status** section shows rows for each member in the household over the age of 16. The **Unearned** and **Other Income** sections display a row for each member in the household.

- Place a checkmark in the corresponding checkbox to denote employment or income status.

Note: When an income match is received the box will be shaded after the page loads. If the income is submitted via Access HRA the box will have a checkmark after the page loads and can only be removed from the **Income Details** screen. Income matches cannot be removed and must be addressed.

Employment Status
All tables display the household member's name with their date of birth. Every row in the **Employment Status Table** must have one box checked. If none of them apply to any of the household members, check **No One**.
The income type columns are:

- Employed
- Self-Employed
- Migrant Farmer
- Unemployed or Affected by a Strike
- Volunteer
- Never Worked

Unearned Income
The **Unearned Income** and **Other Income** tables must have at least one box checked per column. If none of them apply to any of the household members, check **No One:**

- Social Security Benefits (SSI, Disability, Dependent
- Benefits, Retirement, Survivor)
- UIB
- Workers' Comp
- Child Support

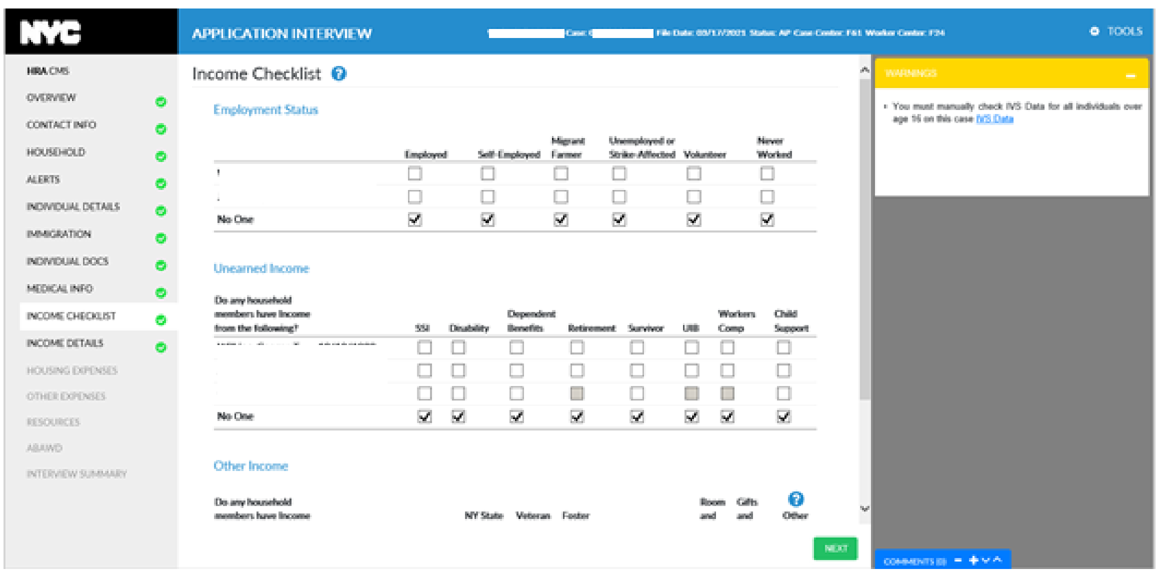
Other Income
Other Income has the following columns:

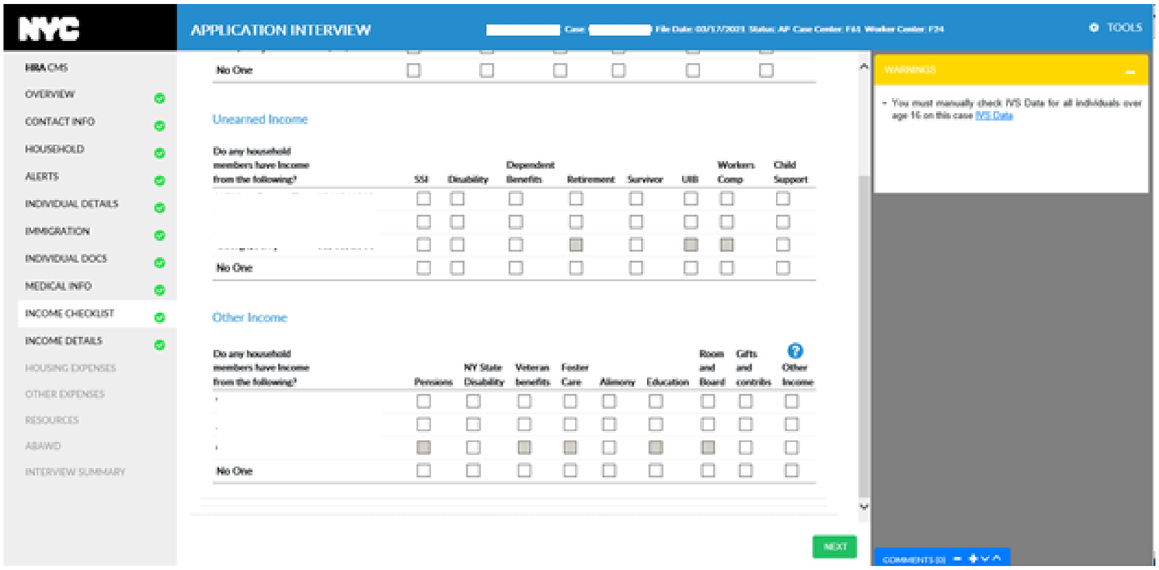
- Pension
- NY State Disability
- Veteran Benefits
- Foster Care
- Alimony
- Education
- Room & Board
- Gifts & Contributions
- Other Income

The **Other Income** column has a blue icon with a question mark ? above it. Click on the **Icon** to view a list of other income types:

- Adoption Subsidy
- Assistance from another State
- Black lung disease
- Census Income
- CEOSC
- College Work Study
- Dividends/Interest from Stocks, Bonds, and Savings etc.
- Earned Income from Job Training Partnership Act (JTPA)
- Earned Income from JTPA/On Job Training (OJT)
- GI Dependency Allotments
- HUD Utility Allowance
- Income from a trust
- Income in kind
- Lump sum payment
- Money from another person
- Money from Charity
- Office of vocational rehabilitation (OVESID)

- On the job training
- Other earned income
- Publica Assistance (PA) only-Excess support payment
- Payments from an annuity
- Payments from Property Sold
- Private Disability Insurance – Health/Accident Insurance Policy
- Public Assistance Grant
- Railroad Retirement Benefit or Railroad Dependent Benefit
- Rental Income
- School to Employment Prog. (STEP)
- Severance pay (Not Lump Sum)
- Severance pay - Lump Sum Payments
- Sick Disability
- Training and Employment Assistance Program (TEAP)
- Training Allotment
- Union Benefits (Including Strike Benefits)
- Veterans Assistance (VA) Spina Bifida Benefits
- Voluntary Work-NON-VISTA
- Volunteer in Service to America (VISTA)
- Work Experience Non-WIN
- Youth Build
- Other Earned Income
- Other Unearned Income





15. Section: Income Details

This section captures and displays the details for each recorded Income Type and the recipient of matches found on household members will also display in the **Income Details** section. Income matches found on household members will also display as a row on the grid. All income matches must be addressed.

All found matches must be resolved by recording whether the match is being disputed by the applicant/participant. If the applicant/participant disputes the match, supporting documentation must be submitted to provide proof.
Income Details is divided into the **Income Grid** and **Income Detail** sections.

Income Grid
The **Income Grid** displays all income reported via ANYC or during an interview for all household members. The **Income Grid** has the following columns:

- HH Member name
- Income Type
- Source
- Detail (e.g., employer name)
- Start Date
- Monthly Amount
- Frequency
- Remove checkboxes – enter checkmark to remove row from grid.

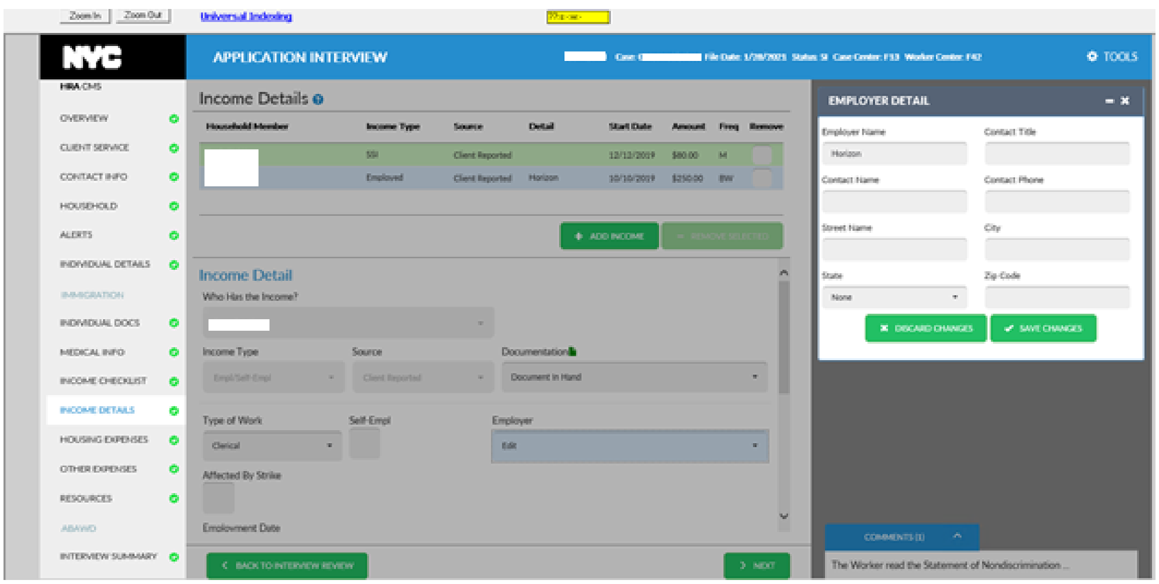
To view the **Income Details** screen, select a row from the **Income Grid**:

- To add new income, click the **Add Income** button. A blank **Income Detail** screen will open.
- The **Income Detail** view displayed via selecting a row will open to information based on the specific Income Type. All income information can be edited by clicking in the text fields and drop-down lists.
- The main section of **Income Detail** has the following drop downs to select an option from:
  - Who has the Income? – Select name of household member with the income
  - Income Type – Select type of income

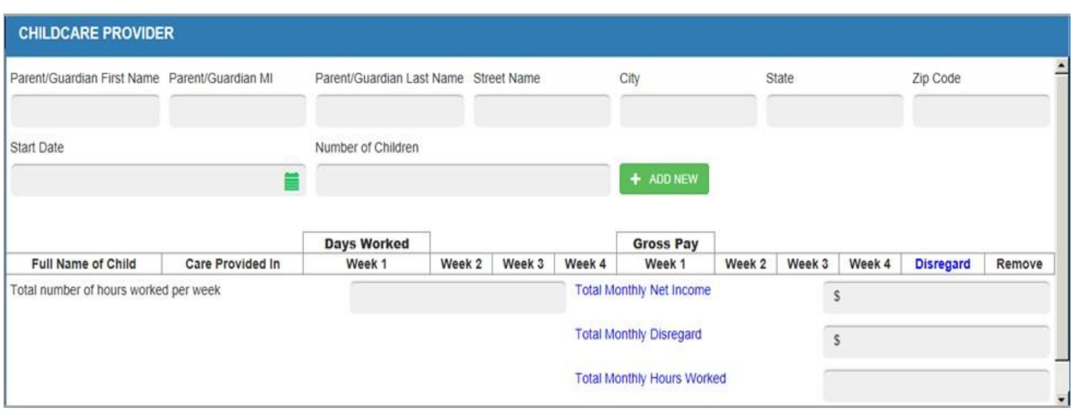
- Source –
  - This is not a Worker selected field. The system will prefill this to Client Reported if it came in from Access HRA and also when the Worker is adding the income during the interview. The system prefills Match if there is a match row on the grid and the Worker is reviewing the match.
- Documentation – Select documentation option.
- Depending on the income type selected there are three possible Detail Data Entry panels that may appear:
  - Employer Detail Panel- for all employment income types except the Childcare provider.
  - Childcare Provider Detail Panel – appears only for the Childcare provider
  - Income Reporting panel and Self Employment ledger – for Self-Employed Income Type only

- Click the **Save Changes** button to save data, otherwise click the **Discard Changes** button.
- Click the **Back to Interview Review** button if finished editing data to return to the Processor mode.

Employed income with Employer Detail Panel

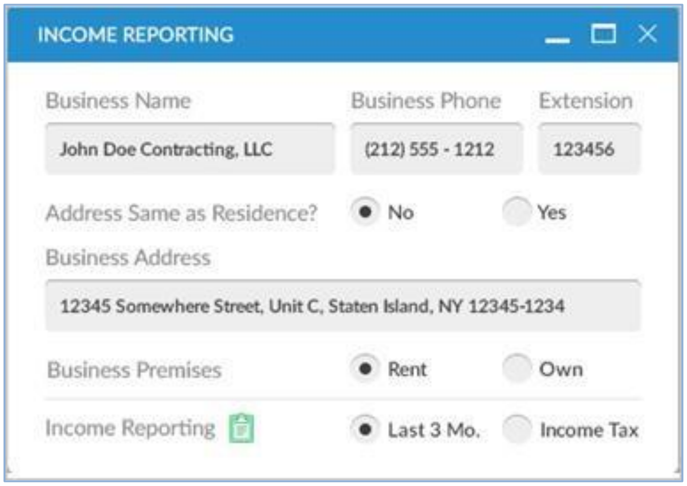


Example - **Childcare Provider Details** window

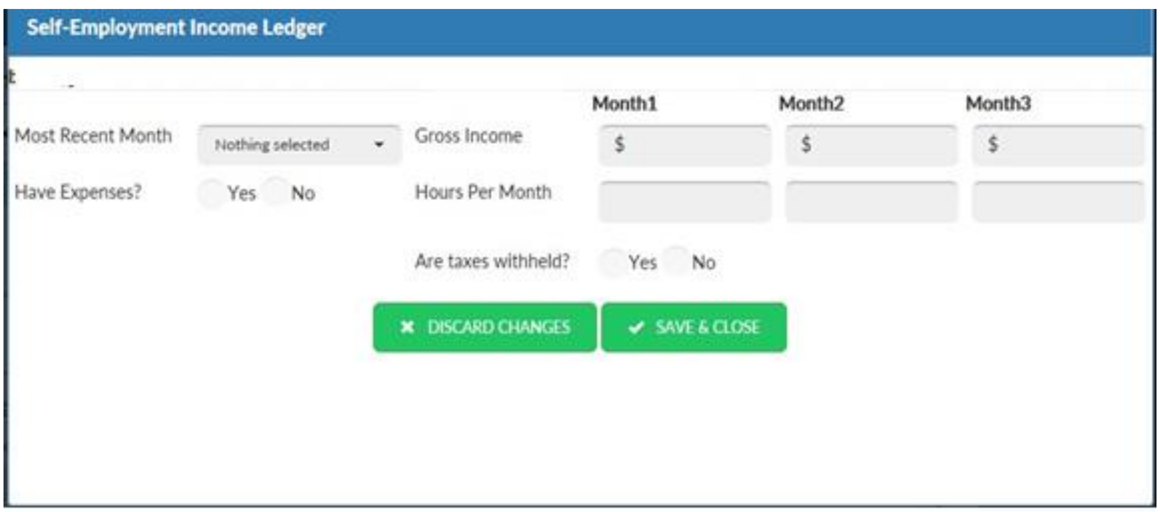


For self-employment income type only

Income Reporting Detail Panel



Self-Employment Income Ledger



Income Details: OCSE Child Support Income Match
The Office of Child Support Enforcement (OCSE) Child Support income match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a Client Reported row for child support income. Remove the Client Reported row and use the match**.**

Streamline POS calculates the amount that should be budgeted.

Budget and dispute logic:

- Match data remains read only.

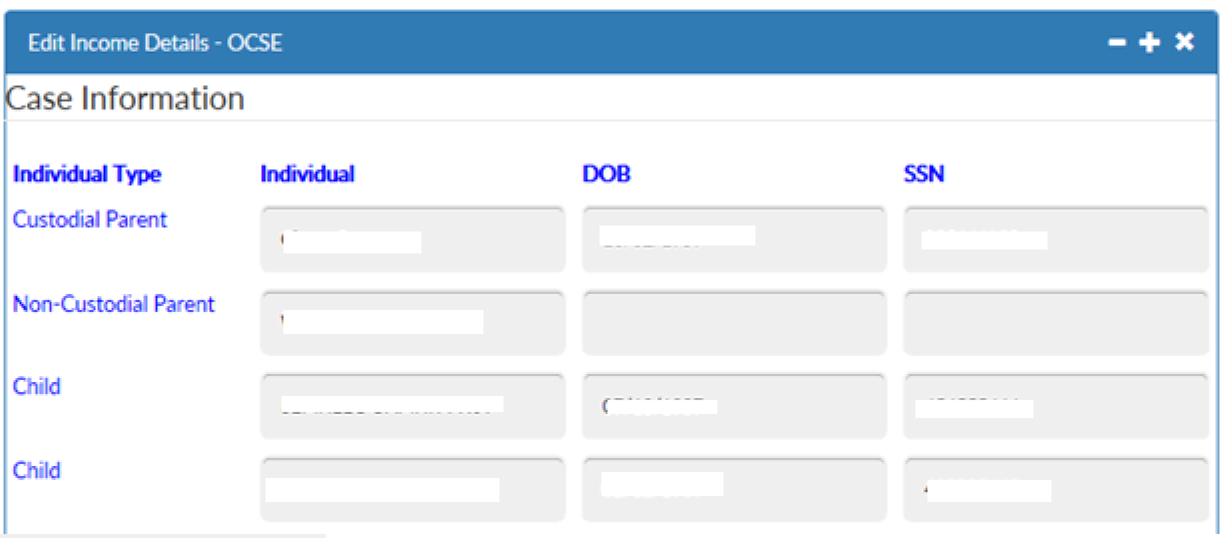
- Missing data must be entered by the Worker.
- Budgeting and averaging of income follow current procedure.
- POS applies lump sum criteria from current procedure in the budget for non-recurring income.
- Income is budgeted unless proper documentation is submitted.
- If successfully disputed, a data entry section opens, and the Worker can enter an end date or update the income

Applicant/Participant Dispute options:

- Amounts are incorrect.
- No longer receiving payments,
- Match information is accurate.

Note: In order to successfully dispute the match, select either **Amounts are Incorrect** OR **No longer receiving payments**. Select **Document in hand** if you have proof of this, and pick **Document Satisfies Dispute** for the **Dispute Outcome** so that the data entry fields will open for the Worker to update the match.

Sample screenshot of OCSE child support income match to update the match.



Income Details: TALX (Work Number Service) match
The TALX match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for the same job. Remove the **Client Reported** row and use the match.

When all data is present and the match is accurate, data from match is budgeted:

- For monthly income, first month of available income is budgeted.
- For bi-weekly and semi-monthly income, the average of two payments is budgeted.
- For weekly income, the average of four weeks is budgeted.
- If frequency is hourly, the pay dates are used to determine frequency.

Budget and dispute logic:

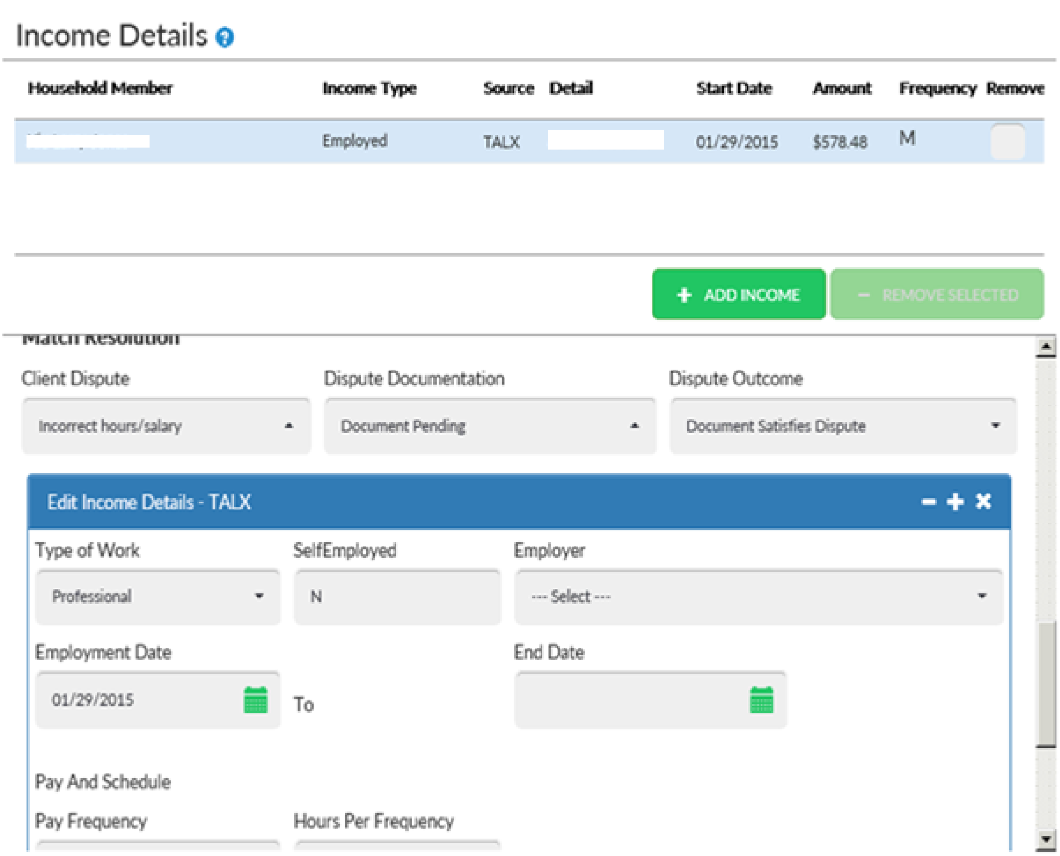
- If income is outdated, the Worker must dispute to prevent income from going to budget.
- Match data remains read only.
- Income is budgeted unless documentation is selected and the documentation satisfies the dispute, per current policy.
- Missing data must be entered by the Worker.
- The Worker can defer for documentation.
- If successfully disputed, a data entry section opens, and the Worker can enter an end date or update the income.

Applicant/Participant dispute options:

- Never Worked for this employer
- No longer working for this employer.
- Incorrect hours/salary
- Match information is accurate.

Note:In order to successfully dispute the match, select either **Incorrect hours/salary** if the applicant or participant is still working for that employer. Select **Document in hand** if you have proof, and pick **Document Satisfies Dispute** for the **Dispute Outcome** so that the data entry fields will open for the Worker to update the match. If No longer working for this employer, a job termination letter should be provided by the applicant/participant.

Sample **TALX match** screen to update the match



Income Details: Automated Child Care Information System (ACCIS) Childcare Provider Match
The ACCIS childcare provider match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

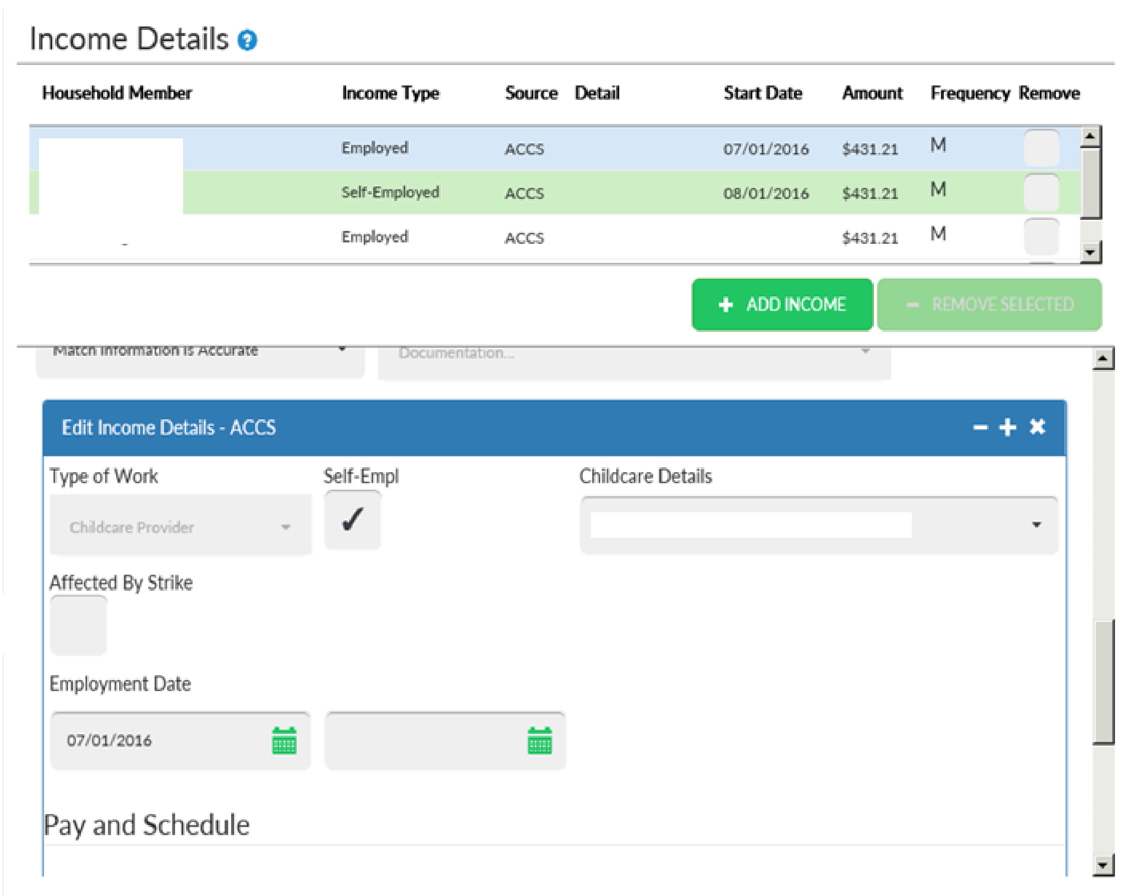
Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for employment as a childcare provider**.** Remove the **Client Reported** row and use the match**.**

The ACCIS match does not include days worked per week, hours worked per week, or income disregard info. Information Verification Service (IVS) groups the information by provider. Information in Streamlined POS is by child as needed for the budget. The Worker enters the childcare provider details.

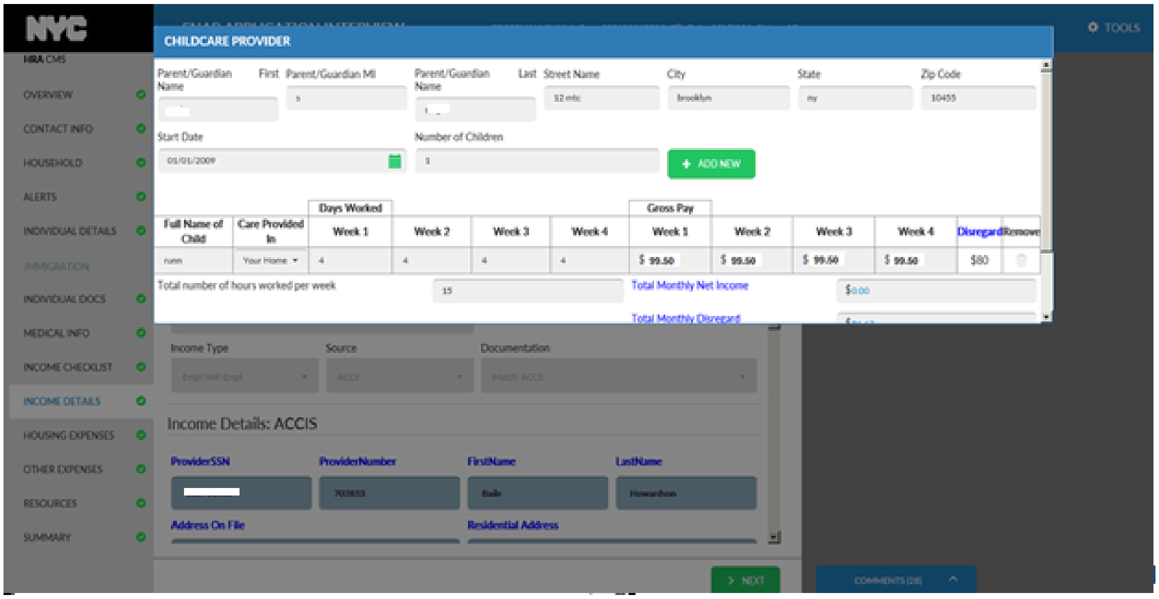
Budget and dispute logic:

- Detail section opens even when the match is accurate.
- Income is budgeted unless documentation is selected and the documentation satisfies the dispute, per current policy.
- Missing data must be entered by the Worker.
- The Worker can defer for documentation.

Sample screenshot of updating the ACCIS match



ACCIS Match Childcare Provider Details window



Income Details: FISA/NYC Employee match

The Financial Information System Agency (FISA) match will appear as a row in the top grid in the Income Details section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for the same job**.** Remove the **Client Reported** row and use the match.

The FISA match does not include hours worked, which are required for budgeting, employment code determination and Able Bodied Adults Without Dependents (ABAWD). Hours worked must be entered by the Worker:

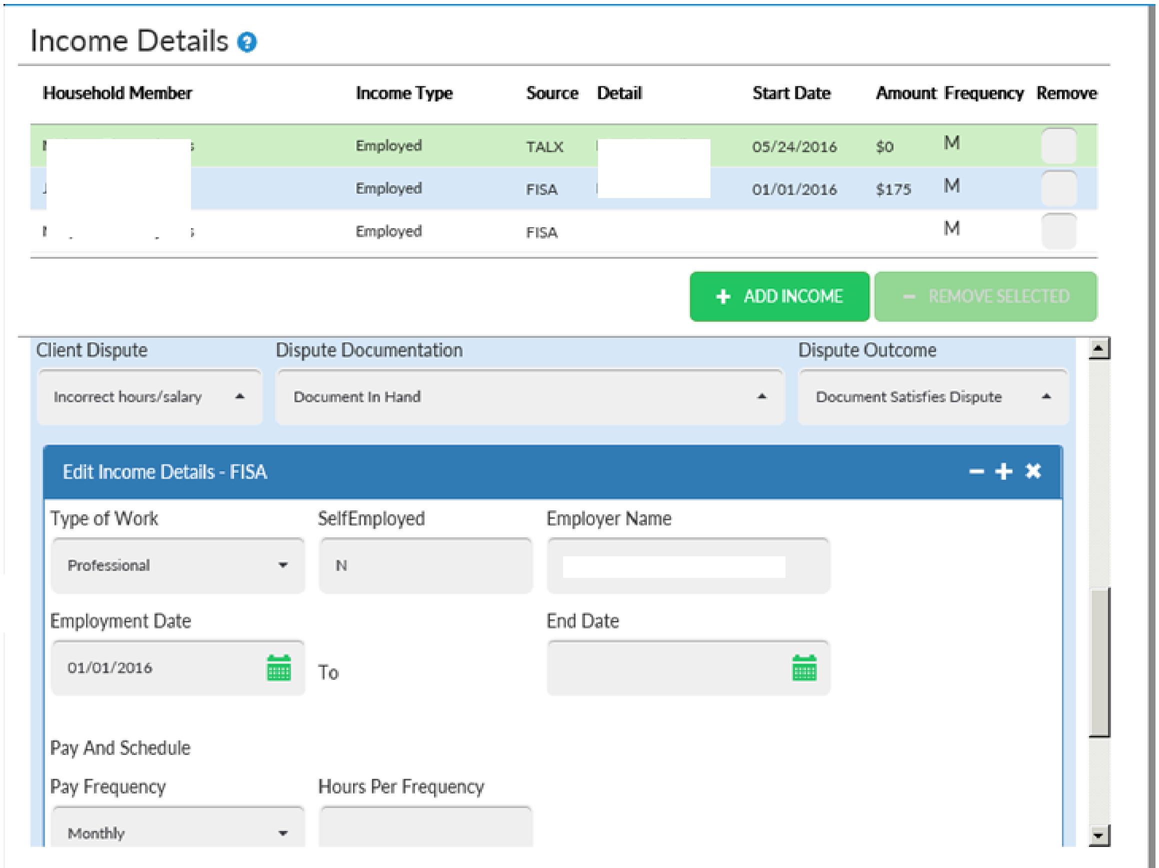
- Client dispute: Incorrect hours/salary
- Documentation: Worker selection – document needed for employment code and ABAWD
- Dispute outcome: Document satisfies dispute.

Budget and dispute logic:

- If income is outdated, The Worker must dispute to prevent income from going to budget.
- Missing data must be entered by the Worker.
- Match data remains read only.
- If the Worker does not enter hours worked, then an error message appears in budget.
- Income is budgeted unless documentation is selected and the documentation satisfies the dispute, per current policy.
- The Worker can defer for documentation.

Sample screen of **FISA** match –

- **Select Client Dispute Incorrect hours/salary** in order to update the hours worked**.**



Income Details: Wage Reporting System (WRS) RFI match
The Wage Reporting System (WRS) match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for the same job. Remove the **Client Reported** row and use the match.

- The Worker reviews the information shown in the match and selects **Not disputing/new information** to add the Resource File Integration (RFI) to the case.
- The Worker can defer the income if the above option is selected or update the information/amounts in the match.
- The Worker must enter income as zero amount if the income should not appear in the budget. This is a Worker determination.

Income Details: New Hire RFI match
The New Hire match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note; In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for the same job. Remove the **Client Reported** row and use the match.

- The Worker reviews the information shown in the match and selects **Not disputing/new information** to add the RFI to the case.
- The Worker can defer the income if the above option is selected or update the information/amounts in the match.
- The Worker must enter income as zero amount if the income should not appear in the budget. This is a Worker determination.

Income Details: Unemployment Insurance Benefits (UIB) RFI match

The Unemployment Insurance Benefits (UIB) match will appear as a row in the top grid in the **Income Details** section of Streamline POS if present on the case.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for UIB. Remove the **Client Reported** row and use the match.

- The Worker reviews the information shown in the match and selects **Not disputing/new information** to add the RFI to the case.
- The Worker can defer the income if the above option is selected or update the information/amounts in the match.
- The Worker must enter income as zero amount if the income should not appear in the budget. This is a Worker determination.

Income Details: SDX match

The SDX match for Social Security Supplemental Income (SSI) income is brought in from the SDX Clearance system into **Streamline POS Income Details** section.

Note: In order to prevent duplication of income, please check the incomes reported in the top grid to make sure there is not a **Client Reported** row for SSI income. Remove the **Client Reported** row and use the match**.**

If the match is disputed and documentation satisfies the dispute, the income from the match will not carry over to the budget. If documentation does not satisfy the dispute, the income will be budgeted.

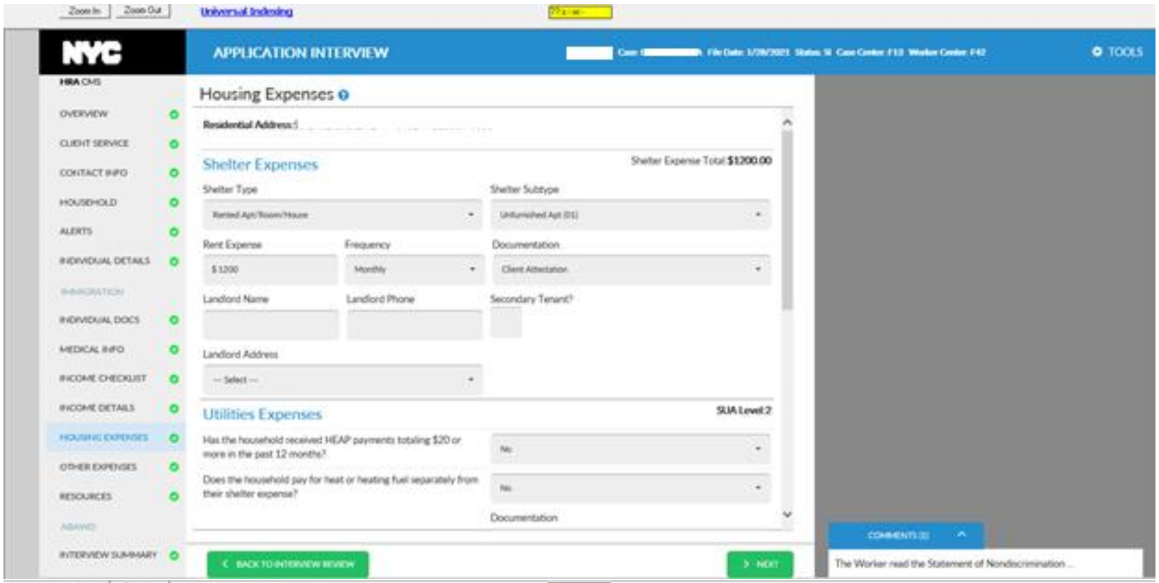
Client dispute options:

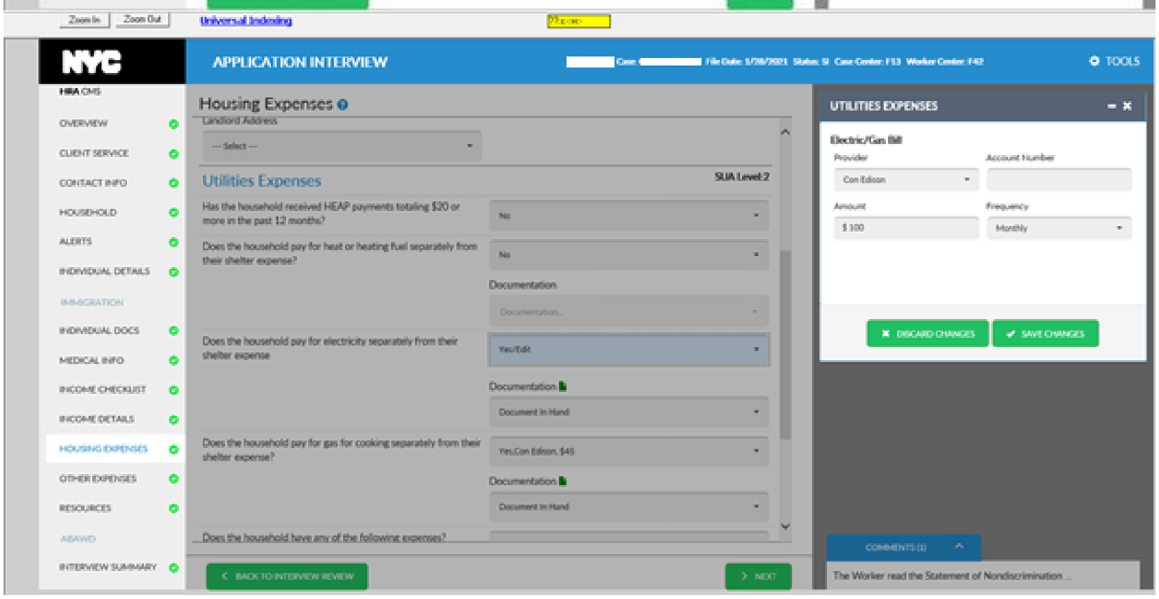
- Match information is accurate.
- Incorrect amounts
- No longer receiving benefits.
- Never received benefits.

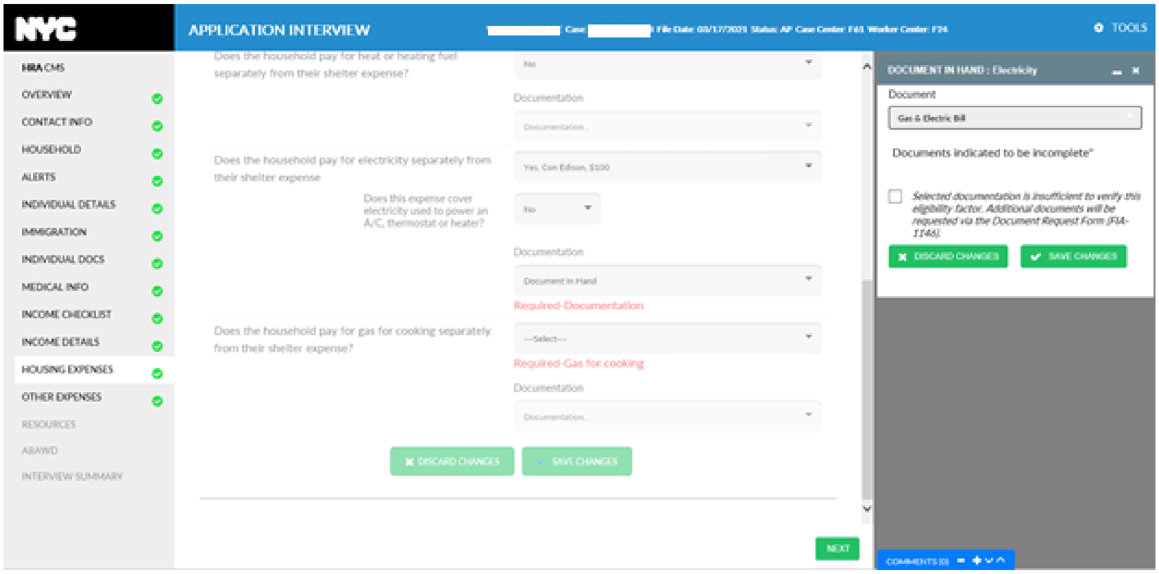
16. Section: Housing Expenses

This section captures the shelter and utility expenses for the household. Shelter matches may appear in this section, including New York City Housing Authority (NYCHA) section 8 and New York City Department of Housing Preservation and Development (HPD) matches. The Home Energy Assistance Program (HEAP), HPD, NYCHA matches run before the page loads. All sections are editable except Shelter Expense Total and Standard Utility Allowance (SUA) Level.

- The Housing expenses screen is divided into the **Shelter Expenses** and **Utilities Expenses** sections. Shelter matches may appear in the right-side panel.
- The Shelter Expenses section displays the following information:
    a. Residential Address – pre-filled from the application
    b. Shelter Expense Total – populates after the recurring shelter expense and frequency have been entered.
    c. Shelter Type – Select an option from the drop-down list.
    d. Shelter Subtype - Select an option from the drop-down list.
    e. Recurring Shelter Expense –Enter the shelter expense.
    f. Frequency – select the frequency from the drop-down list.
    g. Documentation – select the documentation.
    h. Per Night Amt for 1st Person – Appears when shelter type is Hotel/Motel; Enter the amount.
    i. Per Night Amt for Add'l Person – Appears when shelter type is Hotel/Motel; Enter the amount.
- Utilities Expenses - displays the following information:
    a. SUA Level – populates as the questions are answered.
    b. Has the household received HEAP payments totaling $20 or more in the past 12 months? – Select **Yes** or **No** from the drop-down list
    c. Does the household pay for the heat or heating fuel separately from the shelter expense? – Select **Yes/Edit** or **No** from the drop-down list. If yes will open detail entry panel on the right side.
    d. Does the household pay for electricity separately from the shelter expense? Select **Yes/Edit** or **No** from the drop-down list. If yes will open detail entry panel on the right side.
    e. Does the household pay for gas for cooking separately from the shelter expense? – Select **Yes/Edit** or **No** from the drop-down list. If yes will open detail entry panel on the right side.
    f. Does the household have any of the following expenses? Water, Sewage, Garbage disposal– Select **Yes/Edit** or **No** from the drop-down list. If yes will open detail entry panel on the right side.
    g. Documentation - select the documentation for each question answered **Yes**.
    h. Click the **Next** button to continue on to the **Other Expenses** screen.
    i. Click **Back to Interview Review** if done making edits to the interview data to return to the Processor mode.


Universal Indexing
APPLICATION INTERVIEW
TOOLS
HRA CMS
OVERVIEW
CLIENT SERVICE
CONTACT INFO
HOUSEHOLD
ALERTS
INDIVIDUAL DETAILS
IMMIGRATION
INDIVIDUAL DOCS
MEDICAL INFO
INCOME CHECKLIST
INCOME DETAILS
HOUSING EXPENSES
OTHER EXPENSES
RESOURCES
ABAWD
INTERVIEW SUMMARY
Housing Expenses
Residential Address
Shelter Expenses
Shelter Expense Total $1200.00
Shelter Type
Shelter Subtype
Rent Expense
Frequency
Documentation
$ 1200
Monthly
Client Attestation
Landlord Name
Landlord Phone
Secondary Tenant?
Landlord Address
Utilities Expenses
SUA Level 2
Has the household received HEAP payments totaling $20 or more in the past 12 months?
Does the household pay for heat or heating fuel separately from their shelter expense?
Documentation
BACK TO INTERVIEW REVIEW
NEXT
The Worker read the Statement of Nondiscrimination ...

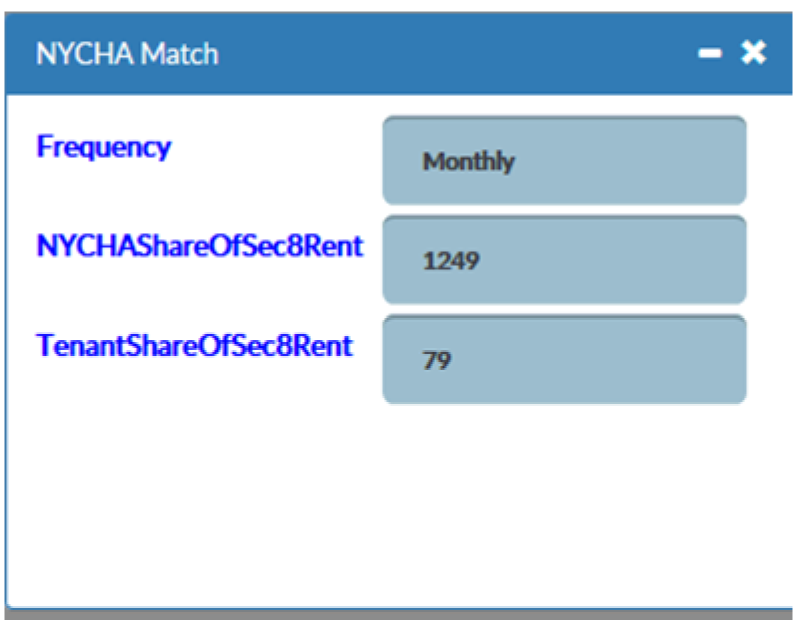

Universal Indexing
APPLICATION INTERVIEW
TOOLS
Housing Expenses
Utilities Expenses
SUA Level 2
Has the household received HEAP payments totaling $20 or more in the past 12 months?
Does the household pay for heat or heating fuel separately from their shelter expense?
Documentation
Does the household pay for electricity separately from their shelter expense
Yes/Edit
Document In Hand
Does the household pay for gas for cooking separately from their shelter expense?
Yes,Con Edison, $45
Does the household have any of the following expenses?
UTILITIES EXPENSES
Electric/Gas Bill
Provider
Account Number
Con Edison
Amount
Frequency
$ 100
Monthly
DISCARD CHANGES
SAVE CHANGES
BACK TO INTERVIEW REVIEW
NEXT
The Worker read the Statement of Nondiscrimination ...



Housing Expenses: NYCHA Section 8 Match
A NYCHA match, if present, will display on the right-side panel of the **Housing Expenses** page. It shows the latest data available from NYCHA which may not be the current information. Remember that shelter expenses for Supplemental Nutrition Assistance Program (SNAP) can be attested to by the applicant/participant and the **Shelter Expense** section is set to **Client Attestation** by default.

There is no applicant/participant dispute function on a NYCHA section 8 match, the match is read only when present.

Sample NYCHA match

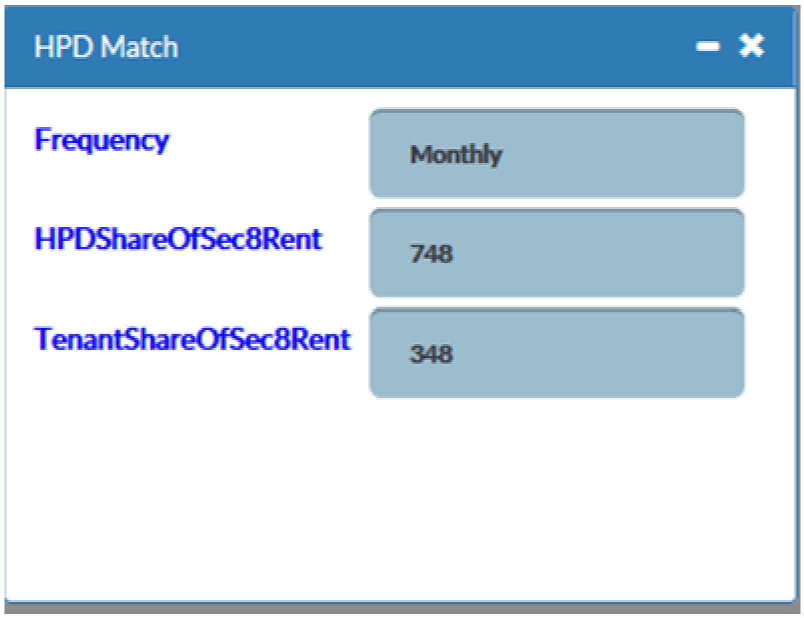


Housing Expense: HPD match

An HPD match, if present, will display on the right-side panel of the **Housing Expenses** page. It shows the latest data available from HPD which may not be the current information. Remember that shelter expenses for SNAP can be attested to by the applicant/participant and the **Shelter Expense** section is set to **Client Attestation** by default.

There is no applicant/participant dispute function on an HPD match, the match is read only when present.

Sample HPD match



17. Section: Other Expenses

This section will capture other expenses for the household, such as medical bills, child support, childcare expenses, dependent care expenses and tuition/education fees. It includes the **Other Expenses Grid** and the **Expense Detail** sections.

- The **Other Expenses** grid displays the following previously reported information:

  a. Household Member
  b. Expense Type
  c. Source
  d. Amount
  e. Remove (checkbox)

- The **Expense Detail** includes the **Default** and **New Expense** views. The **Default** view displays the following:

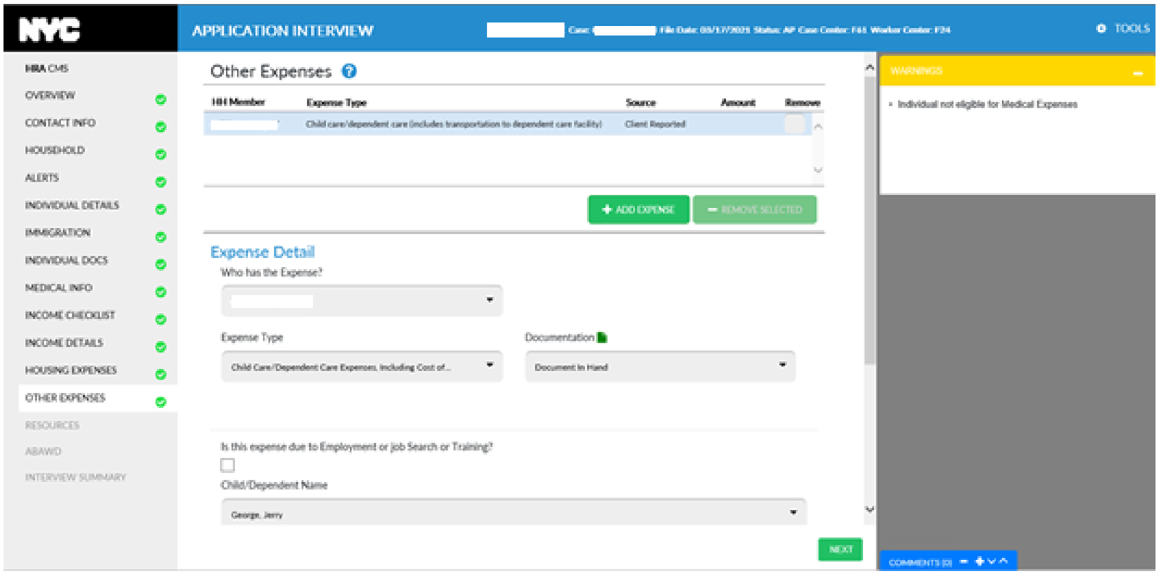
  f. The question: "Does anyone in the household have any of these expenses?" with two possible responses:
     i **No**, none of these apply to any household members.
     ii **Yes**, click Add Expense above to add more.
  g. Medical Bills - does not appear as an expense type unless someone on the case has a reported medical issue.
  h. Court-Ordered Child Support
  i. Job- Related Child/Dependent Care Expenses
  j. Court –Ordered Tuition/Education Expenses

- The **Expense Detail** view displays the following:
  a. Who has the expense? - Select a name from the drop-down list.
  b. Expense Type - Select an option from the drop-down list.
  c. Documentation - Select an option from the drop-down list.

  The type of expense selected will determine the data fields displayed.

- Click **Save Changes** when finished entering/editing data.
- Click **Back to Interview Review** if done making edits to the interview data to return to the Processor mode.

Sample of **Other Expenses**



Other Expenses: OCSE child support expense match
The OCSE Child Support expense match will appear as a row in the top grid in the **Other Expenses** section of Streamline POS if present on the case.

Note: In order to prevent duplication of expenses, please check the expenses reported in the top grid to make sure there is not a **Client Reported** row for child support expense. Remove the **Client Reported** row and use the match.

Streamline POS calculates the amount that should be budgeted.

Budget and dispute logic:

- Match data remains read only.
- Missing data, if any, must be entered by the Worker.
- Selecting Match information is accurate will bring in the match as is.
- Expense budgeting is calculated/averaged according to current policy.
- If successfully disputed, a data entry section opens, and the Worker can enter an end date or update the income.

Client Dispute options:

- Amounts are incorrect.
- No longer receiving payments,
- Match information is accurate.

Note: In order to successfully dispute the match, select either **Amounts are incorrect** OR **No longer receiving payments**. Select **Document in hand** if you have proof of this, and pick **Document Satisfies Dispute** for the **Dispute Outcome** so that the data entry fields will open for the Worker to update the match.

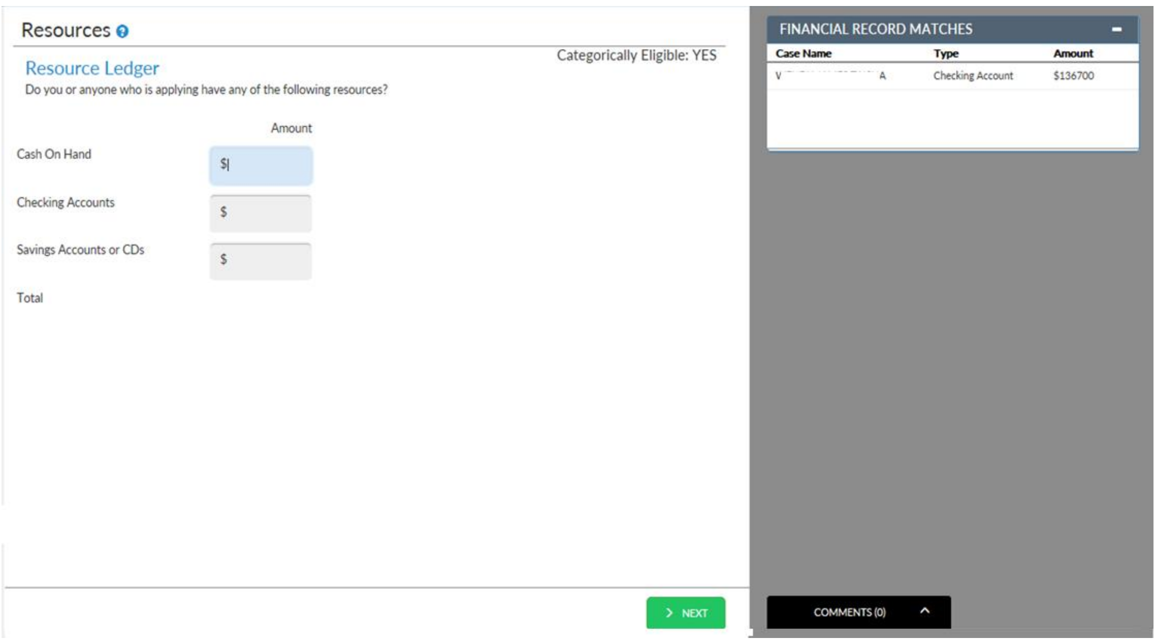
.

18. Section: Resources

This section captures resource information for the household. The household categorical eligibility for SNAP is determined by the time this section opens. The set of questions shown in the **Resources** section will vary depending on whether the case is categorically eligible or not.

Resources – Categorically Eligible view
If the case is categorically eligible (Categorically Eligible = No) then only three fields will display in the **Resource Ledger** which includes **Cash on hand**, **Checking Accounts and Savings Accounts or CDs** to capture amounts of these resources.

- If none, enter **0**.



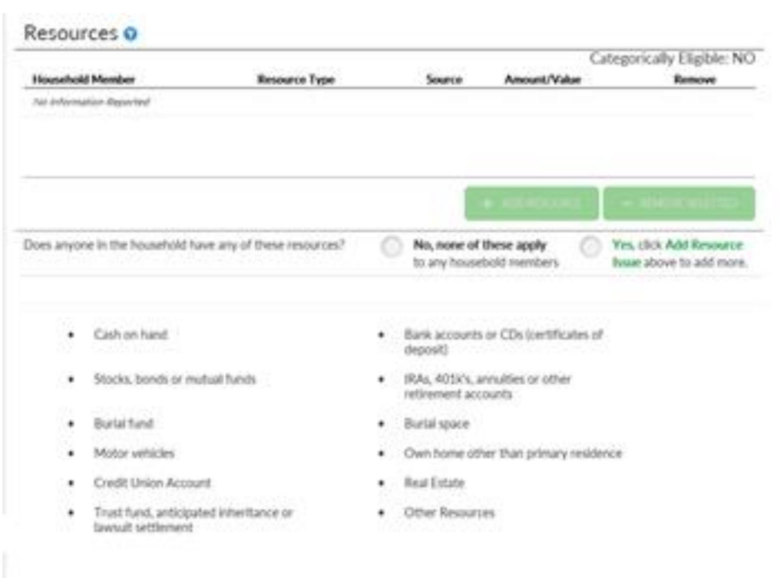
Resources – Categorically Not Eligible view

- If the household is deemed categorically ineligible the **Resources Grid** and **Resources Detail** are enabled. The **Resources Grid** displays with the following information:
  a. Household Member
  b. Resource Type – Type of resource (e.g., Savings, Vehicle, etc)
  c. Source – Match or Client Reported
  d. Amount – the value of the resource
  e. Remove (checkbox) – Note: an RFI match cannot be removed, and it must be properly resolved in WMS.
- The **Add Resource** button is utilized to add a resource from the list below and the **Remove Selected** button removes a row from the Grid if a checkmark is placed in the Remove checkbox.
- The Non-categorically eligible view of Resources displays the following:
  a. Question: “Does anyone in the household have any of these resources?” With the following possible responses:

  i. **No**, none of these apply to any household members.
  ii. **Yes**, click **Add Resource** above to add the applicable resources to the case

b. The following list of possible resources displays:
  i. Cash on Hand
  ii. Bank Account or CDs (Certificates of Deposits)
  iii. Stocks, bonds, and mutual funds iv. IRAs, 401Ks, annuities or other retirement accounts
  v. Burial funds and burial spaces
  vi. Motor vehicles or boats
  vii. Own home other than primary residence
  viii. Credit union account
  ix. Real Estate
  x. Trust fund, Anticipated inheritance or lawsuit settlements
  xi. Other Resources

- Upon Clicking the **Add Resource** button, the **Resources Detail** displays to add information.
  The main section of the **Resource Detail** section displays the following:
  a. Household Member- Select a name from the drop-down list.
  b. Resource Type - Select a resource option from the drop-down list.
  c. Documentation – Select the documentation for verification of resource.
- The selection of the **Resource Type** will determine what other information will be required to be entered.
- After the required information is entered, click the **Save Changes button.**
- Click **Back to Interview Review** if done making edits to Interview Data to return to the Processor mode.
- Click the **Next** button to go to the **Interview Summary** screen.

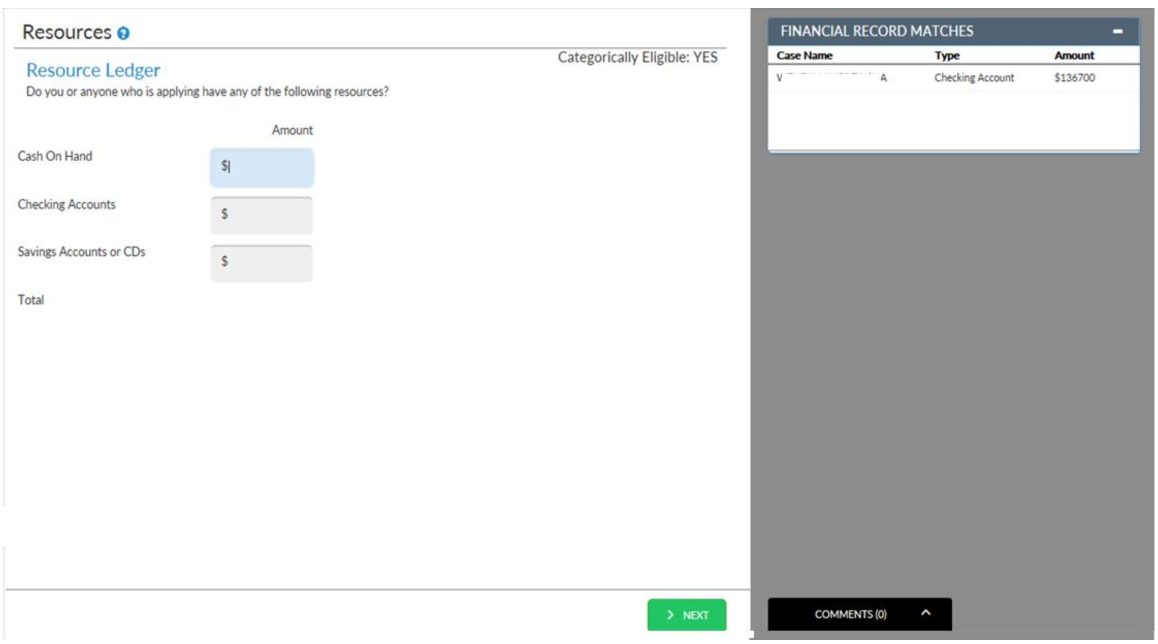


Resources: Bank RFI match

The Bank match will appear in the **Resources** section of Streamline POS if present on the case.
If the case is categorically eligible the BANK match will appear in the right-side panel.
If the case is not categorically eligible, the BANK match will appear as a row in the top grid.

- The Resource Match: RFI Bank Match displays the following resource match information:
    a. Name – Household member with the match
    b. Resource Type – Type or resource
    c. Value – Amount of the resource
    d. Valuation Date – The date resource
    e. Other info – Other pertinent information
    f. The RFI hit must be properly resolved in WMS.
- The Match Resolution and Dispute documentation drop down lists are displayed.
    a. Match Resolution – Select an option from the drop-down list.
    b. Dispute Documentation - Select an option from the drop-down list.

Sample screenshot of **BANK Match** on a categorically eligible case.



19. Section: ABAWD

The ABAWD screen allows the Worker to mitigate strikes or perform re-establishment of an ABAWD applicant/participant. At the time this release notes were published, this screen is disabled because there is a statewide ABAWD waiver in place.

If the ABAWD tab is enabled on the left-side navigation menu, that indicates there are ABAWD applicants/participants on the case (ABAWD indicator A) who have at least one strike.

The ABAWD screen opens with a grid on the top listing each applicant/participant who meets these conditions.

The ABAWD screen initially just displays the top grid, when clicked on would open three components:

- ABAWD compliance calendar data, which is read only. It shows the ABAWD cycle start date, total strike count, grace period used, grace period months, and ABAWD re-establishment date.
- The **Strike Management** section is where the Worker can mitigate recent strikes if the client has provided documentation to justify the removal of a strike.
- The **Re-establishment** section allows the Worker to re-establish an ABAWD applicant/participant that has fallen out of compliance if the applicant/participant can prove that they are now employed or are engaging in job search related activities. The Re-establishment section appears under the following circumstances:
    - If in the application interview, applicant/participant has threeor more strikes
    - If in the recertification interview, applicant/participant has two or more strikes

- The Worker clicks on the row on the grid to see details.

The ABAWD details open, showing the **ABAWD Compliance Calendar Data**. If the person has strikes that are eligible to be mitigated a question “Do you need to update strikes?” Is displayed with **Yes/No**.

- If answered **Yes**, then the Strike Management fields open.

- In the **Strike Management** section, the Worker can select the **Strike Month**, select a **Reason for Removal** and enter the **Justification**. The Worker must also select **Documentation**, click **Save Changes** (or **Discard Changes** if a mistake is made).

If the **Re-establishment** section appears, then the Worker will need to fill out the below questions:
In **Recertification Interview** activity.

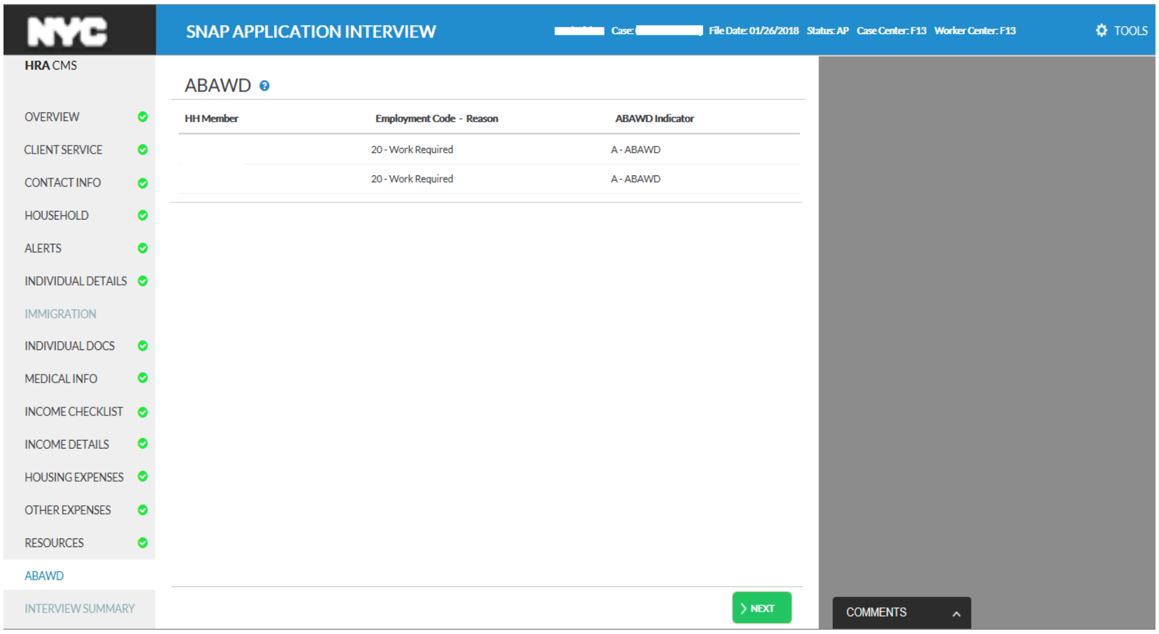
- Have you worked at least 80 hours in a consecutive 30 day period since January 2019? with **Yes/No** dropdown.
- Will you be working 80 hours or more in the next 30 days? with **Yes/No** dropdown.

In the **Application interview**, the same two questions appear as above, along with the additional question “Can you perform a job search for the next 30 days (while application is pending)?” with **Yes/No** dropdown.

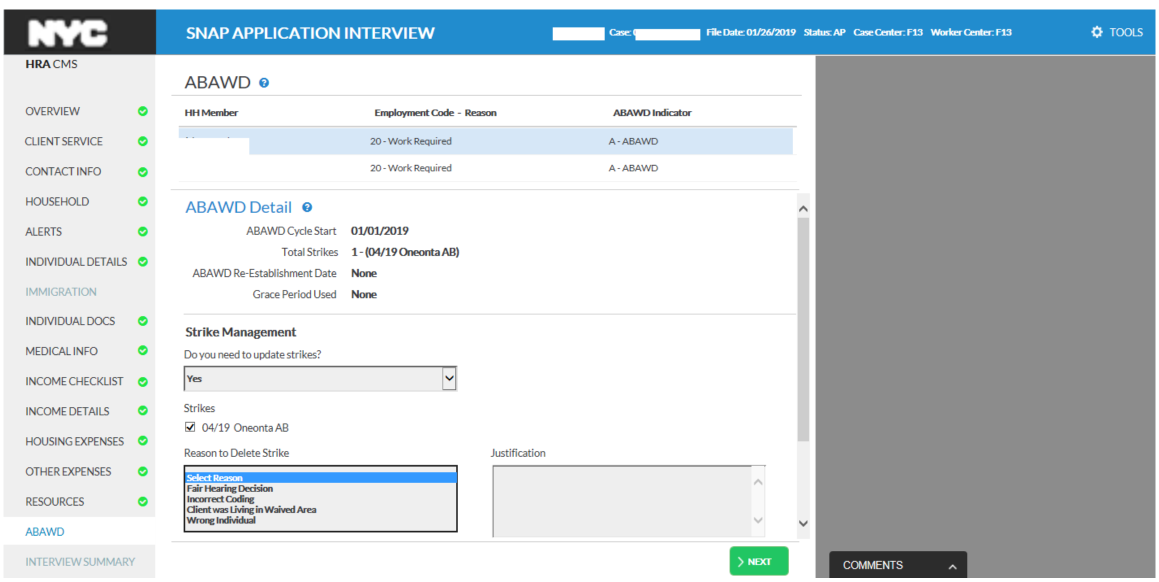
- The Worker must also select **Documentation** in the **Re-establishment** section. **Click Save Changes** (or **Discard Changes** if a mistake is made).

The strike removal or **Re-establishment** will not take effect until the supervisor approves the case and transmits it to WMS.

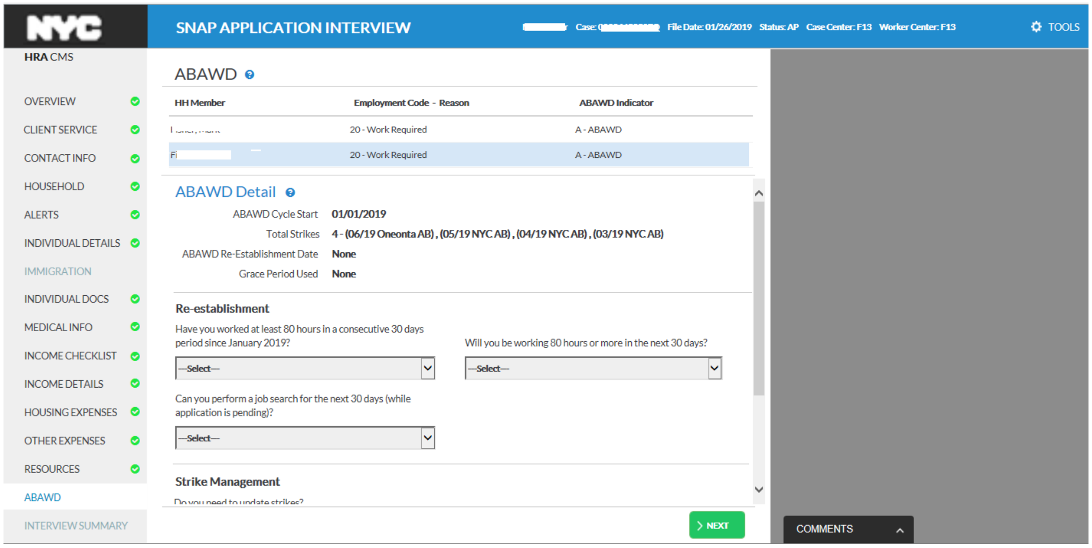
Sample **ABAWD** screens – initial view



Sample **Strike Management** section



Sample Re-establishment section



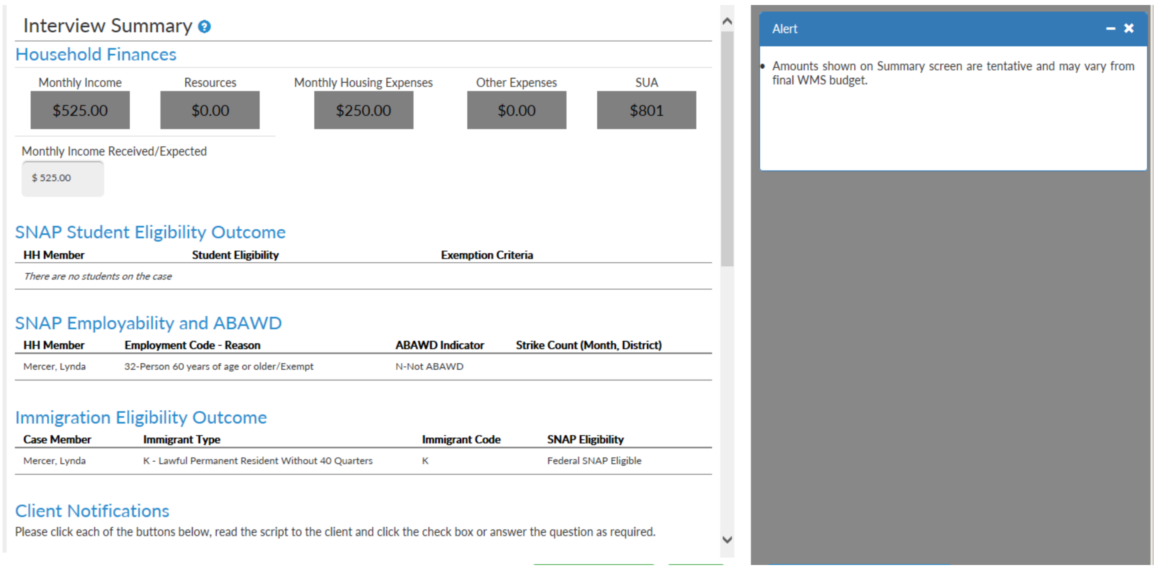
20. Section: Interview Summary

This section provides a high-level summary of the information and follow-up actions for the case. The **Interview Summary** contains the following sections:

- The Household Finances section summarizes the following as reported in the interview:
  a. Monthly Income – Amount of household monthly income
  b. Resources – Amount of household resources
  c. Monthly Housing Expenses - Amount of household shelter expenses
  d. Other expenses
  e. SUA Level
  f. Monthly Income Received/Expected – this field only appears in **Application Interview** activity. It is prefilled with the monthly income calculated by the system. This field is used in *interviewer role only*. In the initial interview, the Worker can change this amount if needed. This value is used in Expedited (ESNAP) eligibility determination.
- SNAP Student Eligibility outcome – shows the household member name, student eligibility outcome and exemption criteria if there are any students in the household. If there are no students, it will show *There are no students on the case.*
- SNAP Employability and ABAWD – shows the household member's name, SNAP Employability code and reason, ABAWD indicator, and strike counts if any for each member of the household.
- Immigration Eligibility Outcome – shows the non-citizen household member's name, the immigration type and Alien Citizenship Indicator (ACI) code, the SNAP eligibility outcome. If there are no non-citizens on the case, then *There is no immigration information* is displayed.

Client Notifications area – Non-discrimination statement button. This button opens a modal window for the Worker to read the non-discrimination statement to the applicant/participant. The Worker needs to check **Client** was notified to acknowledge the window before closing it. Other buttons may appear here, such as the **Work Requirements** button to be read to applicants/participants who are ABAWD (have ABAWD indicator A (ABAWD/Non-waived area. Individual is 18-49 years of age, does not meet an ABAWD exemption, and lives in a non-waived area. For work-limited individuals (Employability Code 16 or 64), individual is able to work 20 or more hours per week.). These scripts must be acknowledged at the very bottom the Worker needs to check **Client** was notified before closing the window.

- Print Forms button – opens the **Forms** screen in Streamline POS. Completing the Forms screen also marks the interview as kept and will have the case go into processor mode.
- Follow-Ups – The **Follow-Ups** grid lists any follow-up tasks that resulted from the interview, specifically: matches that the applicant/participant disputed, and case/line changes that need to be made to other cases before lines on this case can be activated. If a lower-score Medicaid CIN was selected by the system and corrections need to be made to Medicaid's data that would also be a follow-up listed here. The grid has two columns, both **read-only**:
    a. Household Member – Name of household member
    b. Follow-Up Task – Type of follow-up action required.



Interview Summary ESNAP related fields/questions – For Interviewers and Separate Determination for One-Shot Deal Applicants only

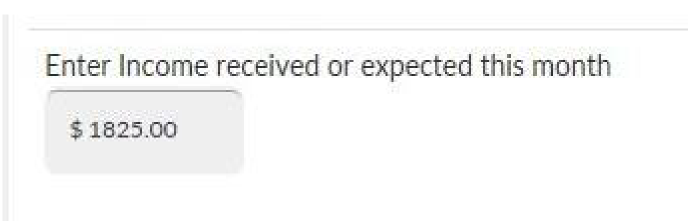
The **Interview Summary** screen in the **Application Interview** was updated to allow capture of the information required for the ESNAP determination.

These changes include:

- A question for income received or expected in the month of application.
- A question to determine whether there was agency error or delay when the application interview takes place on the eighth day after the application date or later.

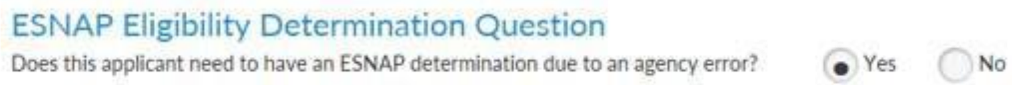
Question for income received or expected in the month of application

A field allows the interviewer to capture the income received or expected in the month of application: Enter income received/expected this month.



Question for late interview to determine whether there was agency error or delay
A question is used to determine whether there was agency error or delay when the application interview takes place on the eighth day after the application date or later:

Does this applicant need to have an ESNAP determination due to an agency error?



If there was agency error, then SPOS starts the **ESNAP Decision** activity when the Interviewer clicks the **Next** button in the **Interview Summary**.

Attachment F

Streamlined POS Release Notes

Version 4.2, Summer 2021

These Release Notes contain descriptions of changes and fixes in the Streamlined Paperless Office System (SPOS) release 4.2. These and prior Release Notes also be found on the HRA Intranet at http://intranetnew.hra.nycnet/sites/HRAIntranet/Pages/POSReleaseNotes.aspx

Table of Contents

Streamlined POS Release Notes

Version 4.2, Summer 2021

1. Document Objective

The objective of this document is to provide context for the Worker on the processing screens and for the Supervisor on the approval screens.

2. Application, Recertification, Change Case Data and Error Correction Activities in SPOS

The Application, Recertification, Change Case Data and Error Correction processing activities in SPOS include 7 screens:

- **Overview** – This read-only section provides a high-level overview of the case and opens the Information Verification System (IVS) and the HRA One Viewer when the activity starts.
- **Interview** – This read-only section provides access to the interview data in a single screen. It also provides access to the editable interview sections.
- **Budget** – This section allows the Worker to calculate a new Welfare Management System (WMS) budget.
- **TAD** (Turn-Around Document) – This section allows the Worker to make updates to case and individual status information, and to select new budgets.
- **Grants** – This section allows the Worker to enter new grants.
- **Forms** – This section allows the Worker to prepare forms for the case.
- **Processor Summary** – This section allows the Worker to resolve Resource File Integration (RFI) matches and to submit the case to the Supervisor.

In the Expedited Supplemental Nutrition Assistance Program (ESNAP) activity, an additional screen named **ESNAP Eligibility Determination** appears between the **Interview** and **Budget**.

Processor flow in SNAP Application Interview, Recertification Interview and Change Case Data
The following SPOS screens appear:

- Overview
- Interview
- Budget
- TAD
- Grants
- Forms
- Processor Summary

Processor flow in ESNAP Issuance
The following SPOS screens appear:

- Overview
- Interview
- ESNAP Eligibility
- Budget
- TAD
- Grants
- Forms
- Processor Summary

Processor flow in SNAP Error Correction activities
The following SPOS screens appear:

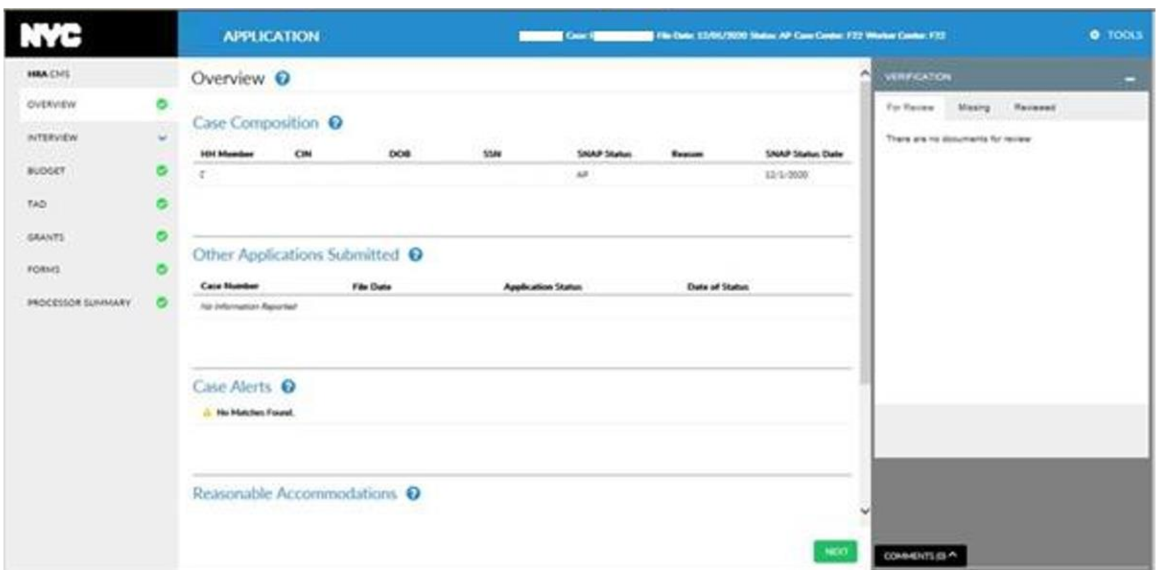
- Overview
- Interview
- Budget
- TAD
- Grants
- Forms
- Processor Summary

3. Processor Section: Overview

This is the first section providing a *read-only* Overview of the case, including household members, various relevant alerts and available documentation.

The following information is displayed on this section:

- Case Composition
- Other Applications Submitted
- Case Alerts-displays alerts such as matches found
- Reasonable Accommodations
- Event log



Additional sections may appear on **Overview** depending upon the activity being opened or circumstances of the case:

- During an error correction activity, there will be an **Error Correction** section displayed on the **Overview** which shows the WMS errors.
- If the action was returned to a Worker by a supervisor, there will be a **Supervisor Return** section showing the disapprovals on the Overview.

Sample of Error Correction section

Error Correction

Error Number	Date of Error	Error Item number	Household Member / Line	Error Description	Additional Information
E1200	01/29/2018	145		Income source is not compatible	Income source is not compatible with SSI individual

Sample of Supervisor Return section

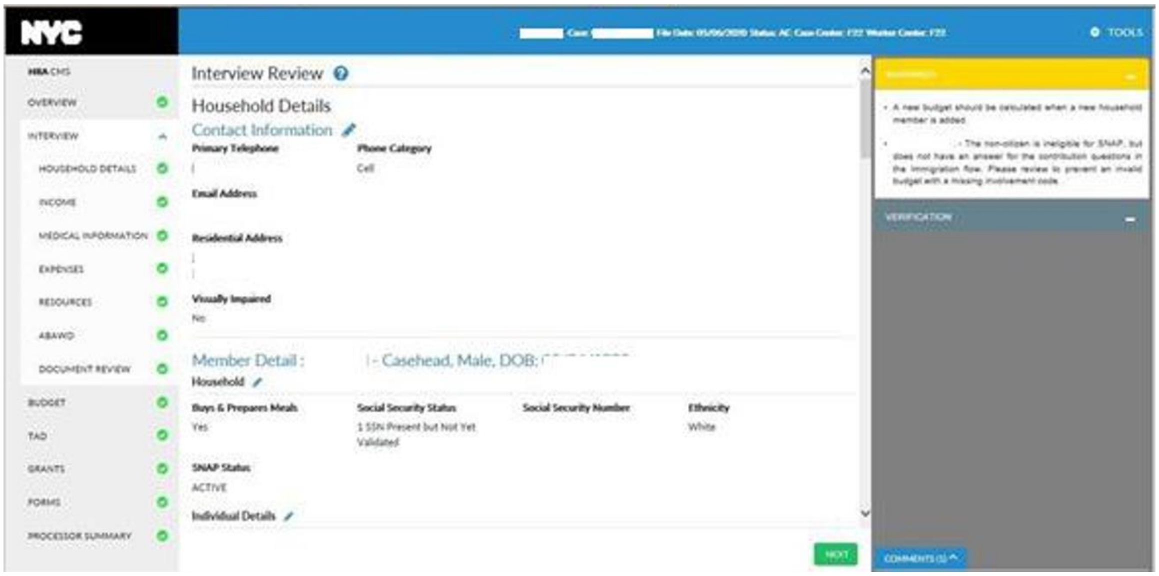
Supervisor Return

Section / Question	Household Member / Line	Supervisor / Disapproval Date	Disapproval Reason and Comment
Household Details	a / 2	02/15/2018	Invalid Social Security Number - Social Security Number is incorrect. Please correct as document seen in viewer.
Household Details	:/ 1	02/15/2018	Social Security validation is incorrect - Update Social Security to present.
Income Details	:/ 1	02/15/2018	Inaccurate working hours - Client works weekly. So please correct the working hours.

4. Processor Section: Interview Review

The **Interview Review** screen provides a read-only view of the case information on a single screen. It includes the following sections:

- **Household Details** – This section includes contact information, member details, individual details, alerts and immigration information.
- **Income** – This section includes earned income, unearned income and other income.
- Medical Information – This section includes disability and other medical information.
- **Expenses** – This section includes shelter, utility and other expenses.
- **Resources** – This section includes bank accounts and other types of resources.
- **ABAWD** – This section includes employment codes and other compliance information for able-bodied adults without dependents.
- **Document Review** – This section includes the summary of the reviews completed using the Verification Widget.



- To access the Editable Interview, click on a pencil icon in any main section of the **Interview Review**, such as *Household Details*. Clicking on any of the pencil icons will bring you to that section in editable interview mode.

5. Processor Section: ESNAP Eligibility Determination

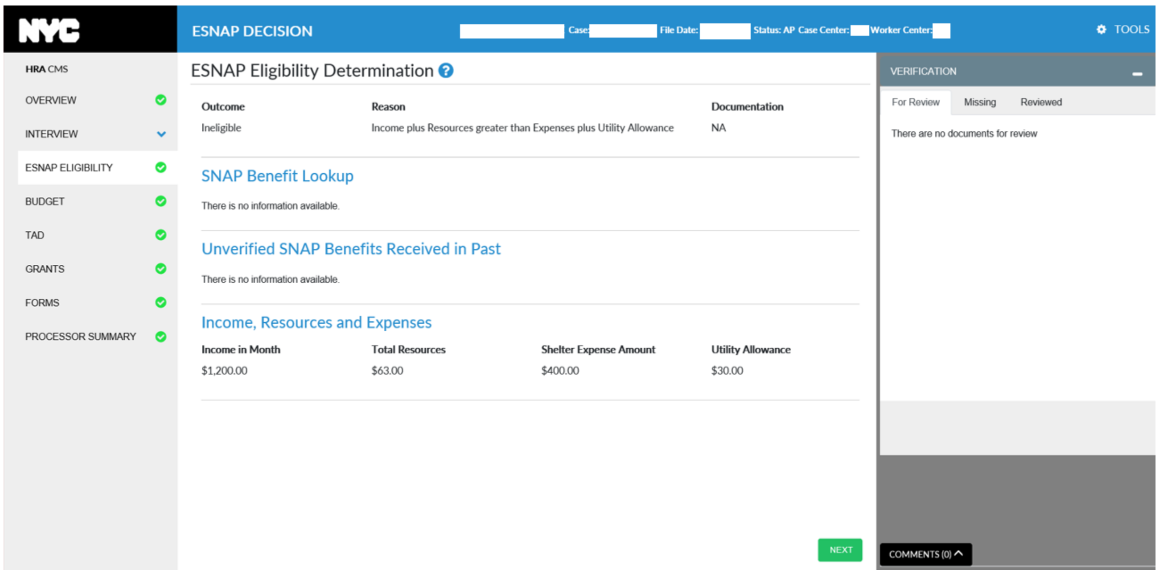
The **ESNAP Eligibility Determination** screen is the first screen displayed when the processor is taken from the **SNAP Application Interview** to the **ESNAP Issuance** activity.

SPOS runs business rules to determine the applicant's eligibility for ESNAP, based on the interview information and verification provided by the applicant, the available match data and the available WMS information.

The screen includes the following sections:

- **ESNAP Eligibility Determination** – This section includes the results of the eligibility determination, including:
  - Outcome – the possible ESNAP eligibility outcomes are Eligible, Ineligible and Unable to Issue.
  - Reason – the reason for the eligibility determination is displayed.
  - Documentation – for eligible cases, the level of documentation provided is displayed. If all documentation was provided and all RFI were received and resolved, the field indicates Full. Otherwise, the field indicates Partial.
- **SNAP Benefit Lookup and Unverified SNAP Benefits in Past** – This section includes the results of the WMS benefit lookup for the month of application, including:
  - Benefits found in WMS.
  - Case number on which the benefits were issued, if any.
  - Whether the applicant has a special assessment situation and enter a shelter in the current month.
  - Received unverified ESNAP.
  - Date of unverified ESNAP.
  - Recurring SNAP Benefits after unverified ESNAP.
  - Recurring date

- **Income, Resources and Expenses** – This section includes the income, resources, shelter expense and utility allowance amounts used to make the ESNAP eligibility determination, if applicable:
  - Income in Month
  - Total Resources
  - Shelter Expense
  - Utility Allowance



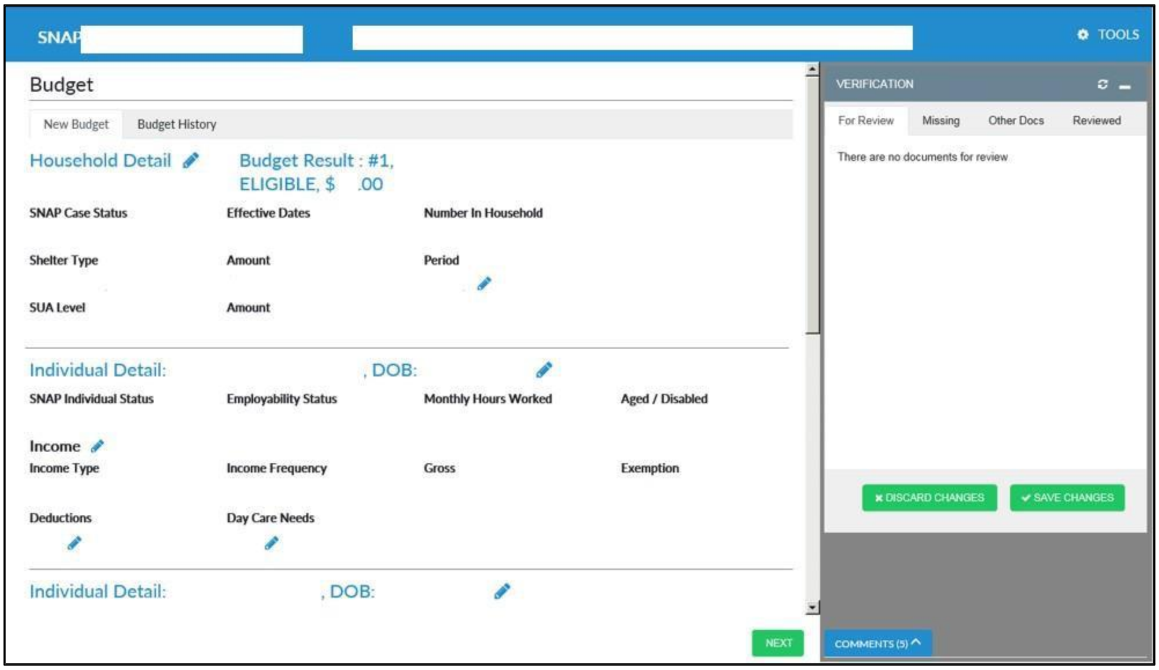
6. Processor Section: Budget

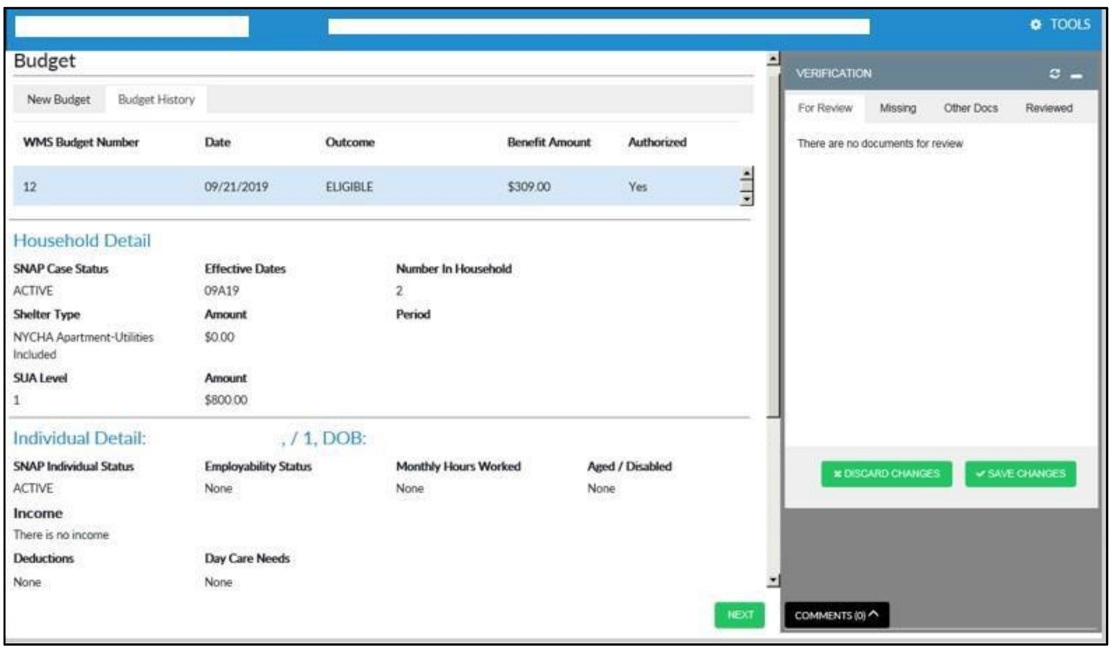
The new **Budget** screen converts the interview information into the codes required for WMS budgeting, allows calculation of the WMS budgets and allows viewing of saved WMS budgets.

The screen includes two tabs:

- New Budget
- Budget History

When there is no WMS budget saved for the case, the **New Budget** tab opens by default. Once there is at least one WMS budget saved for the case, the **Budget History** opens and the processor clicks on the **New Budget** tab when they need to calculate a new budget for the case. The Processor clicks the **Calculate Budget** button to start the WMS budget calculation.



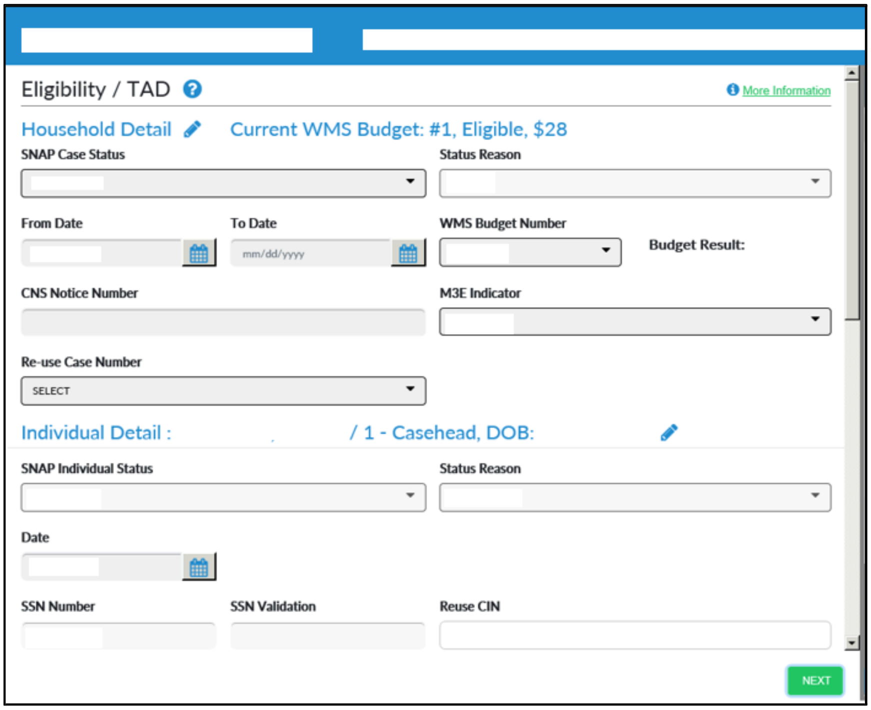


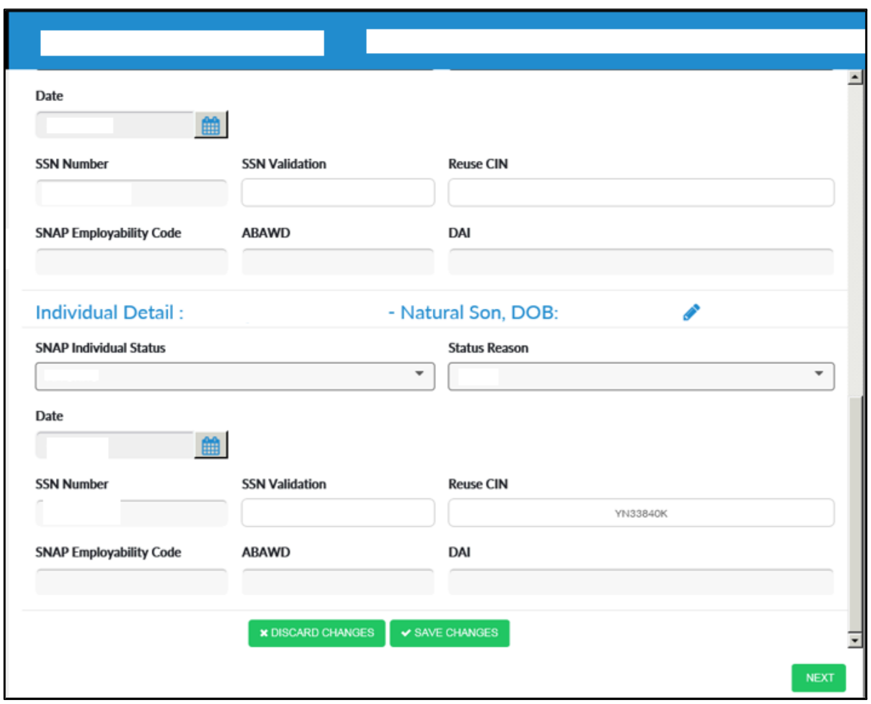
The processor can use the **Next** button to access the TAD screen or can use the navigation bar to access other areas. Edit pencil icons on the screen allow access to the editable interview screens.

7. Processor Section: TAD

The **TAD** screen allows the Processor to make the entries for the decision on the application and active cases, including selection of the statuses and reasons for the case and the individuals, entry of the Client Notice System (CNS) number, selection of the WMS budget and viewing of current WMS information.

TAD – Main Panel





The TAD screen consists of the following sections and fields:

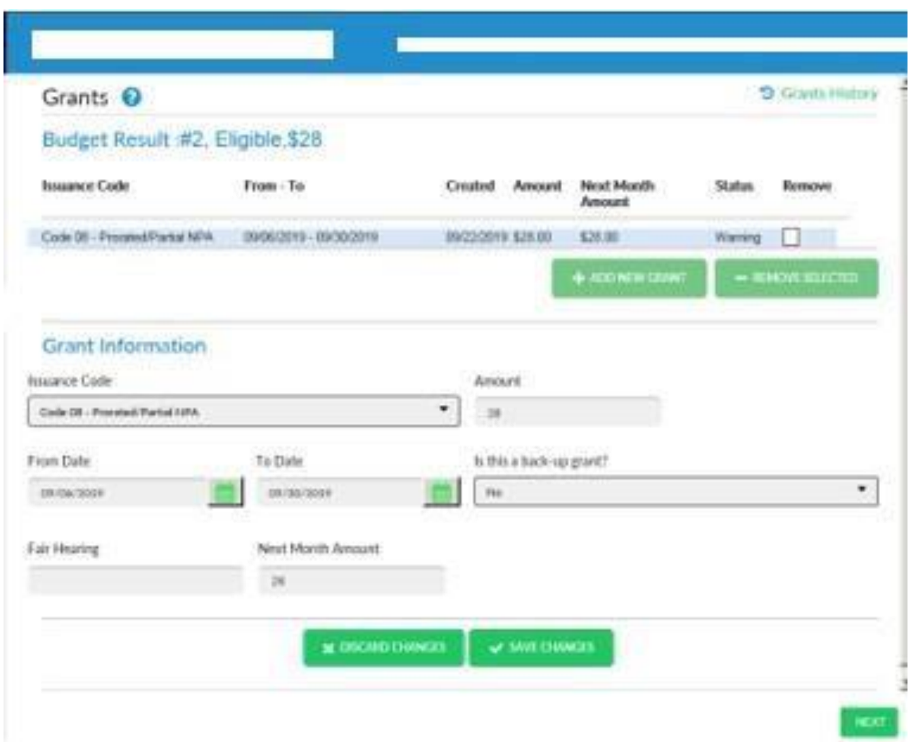
- **Current WMS Budget Header**: this header includes the current WMS budget number and result. When the budget result is eligible, it includes the SNAP benefit amount.

- **Household Detail section**
    - SNAP Case Status – this field initially displays the current WMS SNAP status for the case and allows the processor to enter a decision for the case, based on the current status.
    - Status Reason – this field is enabled when required, based on the selection made in the SNAP Case Status field.
    - From Date – this field is enabled for case rejections when required, based on the selection made in the **SNAP Case Status** field.
    - To Date – this field is enabled for case closings when required, based on the selection made in the **SNAP Case Status** field.
    - WMS Budget Number – displays a list of saved eligible WMS budgets when the case status is in Active (AC) status or is changed to Single Issue (SI)or AC (status); displays a list of saved ineligible WMS budgets when the processor selects a rejection or closing code that requires an ineligible budget.
    - Budget Result – this field displays the result of the selected WMS budget (i.e. Eligible) and an amount when the budget result is eligible and displays the reason for ineligibility if the budget result is ineligible.
    - CNS Number – this field allows the processor to enter the CNS notice number.
    - M3E Indicator – this field allows the processor to suppress the CNS notice. The possible values are: **1** (Immediate Action for Administrative Reasons), **A** (Manual Notice - Adequate Action), or **T** (Manual Notice - Timely Action).
    - Re-use Case Number – this field with the case number is reused for SNAP cases in AP status in WMS only, if any.
- **Individual Detail Section** with the name, line number, relationship and date of birth for each individual
    - SNAP Individual Status – enabled when required.
    - Status Reason – enabled when required.
    - Date – enabled when required.
    - SSN (Social Security Number) – read-only field.
    - SSN Validation – read-only field.
    - Reuse Client Identification Number (CIN) () – read-only field for individuals in Application (AP) status in WMS only.
    - SNAP Employability Code – read-only field.
    - ABAWD (Able-Bodied Adult without Dependents) – read-only field.
    - DAI (Disability Accommodation Indicator) – read-only field.
- **Buttons:**
    - Discard Changes – this button allows the processor to cancel any changes made on the TAD screen.
    - Save Changes – this button allows the processor to save changes made on the TAD screen and runs the business rules for the TAD entries made.
    - Create Notice # (Number) – the Create Notice # button appears when the creation of a CNS notice for the SNAP status reason selected is supported through the Office of Temporary and Disability Assistance (OTDA) CNS Write web service. Clicking on the button automatically creates the CNS notice number, which is then entered by SPOS in the CNS Notice Number field.
    - Retrieve Notice # (Number) – the Retrieve Notice # button appears when the selected SNAP status reason requires a CNS notice, but it cannot be created through the OTDA CNS Write web service. The processor must open WMS to create the CNS notice number and then return to SPOS to click on the **Retrieve** button to fetch the CNS notice number into the SPOS TAD. If the number cannot be retrieved, the Worker should copy the value from WMS and paste it into the CNS notice number field.
- **More Information –** Additional household and individual information available through the More Information link.

- **Household Detail –** includes WMS case status, reason and dates, language information, application and recertification source, Continued Eligibility Determination (CED) and interview dates for recertification and homebound indicator.
- **Individual Detail –** includes relationship, date of birth, WMS individual status, reason code, individual date, marital status and veteran status for each individual on the WMS case.

8. Processor Section: Grants

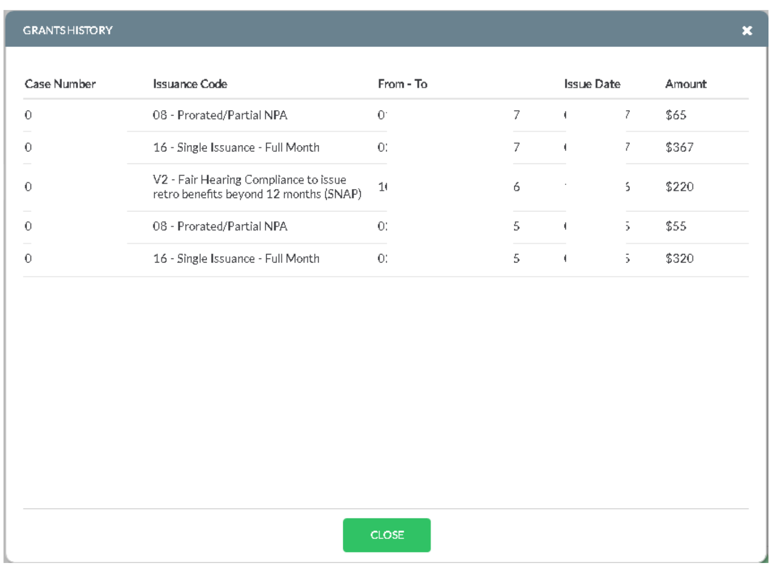
The **Grants** screen allows the processor to data entry single issue grants and view WMS grant history for the case.



The screen consists of the following section and fields:

- **Budget Result section:** Current budget number, result and amount
- **Grants Grid:**
  - Issuance Code
  - From – To
  - Created
  - Amount
  - Next Month Amount
  - Status
  - Remove
  - Add New Grant button to create new grants - The button is disabled when the case is in Rejected (RJ) or Closed (CL) status.
  - Remove **Selected** button to remove data entered grants.
- **Grant Information Section** for the selected grant in the Grants Grid:
  - Issuance Code
  - Amount
  - From date
  - To date
  - Is this a backup grant?
  - Fair Hearing
  - Next Month Amount
  - Save Changes button to save the entries and run the rules.
  - Discard Changes button to discard entries made.
- **Grant History –** The **Grant History** link opens a pop-up screen that allows the Processor to view recent SNAP benefits issued for the case, including benefits on other CA and SNAP cases with the same head of household.

Grants History



GRANTS HISTORY

Case Number	Issuance Code	From - To	Issue Date	Amount
0	08 - Prorated/Partial NPA	0' 7	(7	$65
0	16 - Single Issuance - Full Month	0: 7	(7	$367
0	V2 - Fair Hearing Compliance to issue retro benefits beyond 12 months (SNAP)	1(6	' 5	$220
0	08 - Prorated/Partial NPA	0: 5	(5	$55
0	16 - Single Issuance - Full Month	0: 5	(5	$320

CLOSE

ESNAP Grants

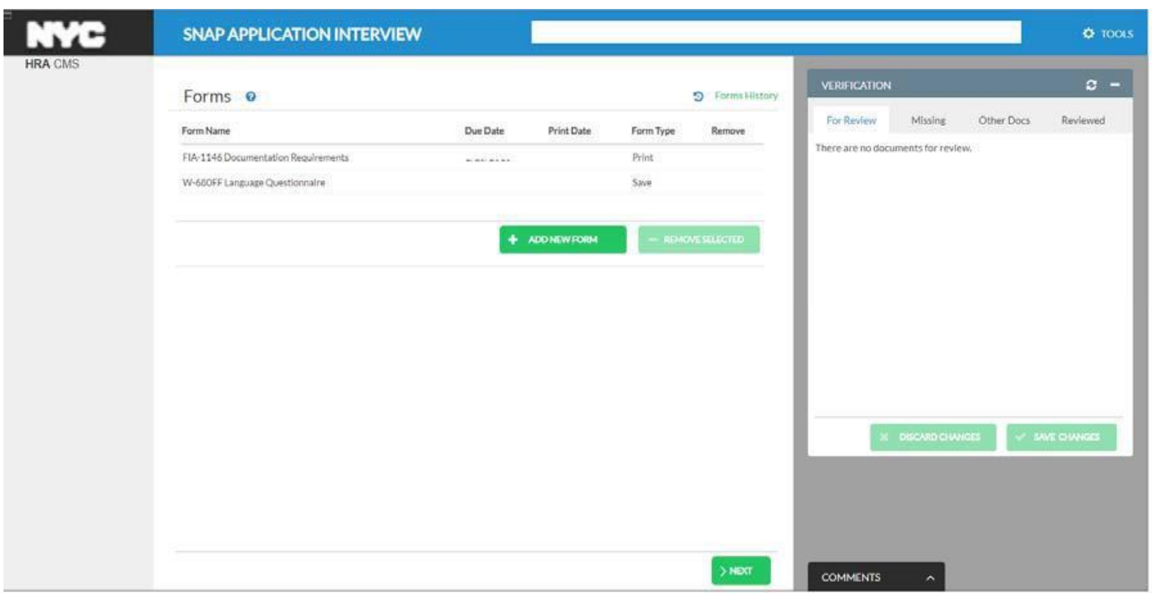
In the **ESNAP** activity, grants are automatically calculated by the system when the case is eligible for ESNAP, based on the budget authorized on the TAD.

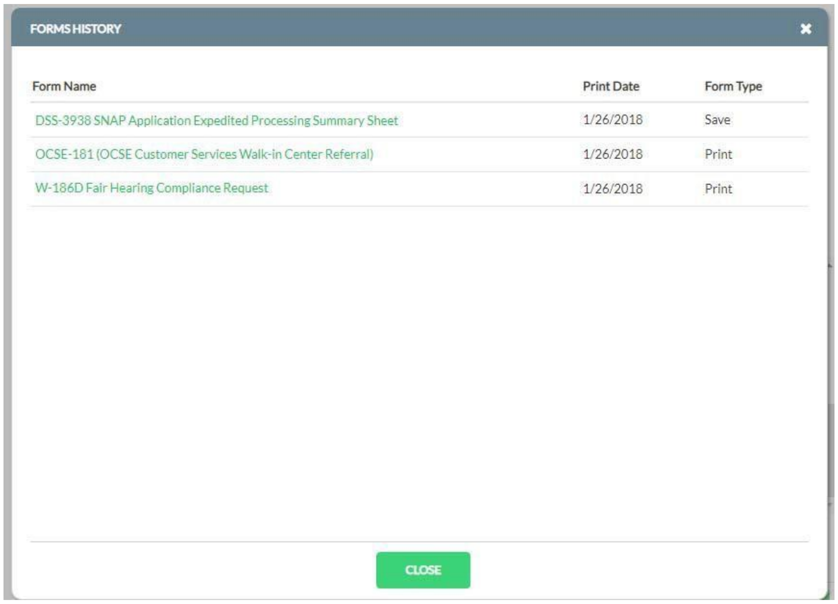
9. Processor Section: Forms

The **Forms** screen allows the Processor to data enter forms, select forms for printing and view form history for the case. The window has the same layout for the processor as the interviewer.

The screen contains the following sections:

- Form History – The processor can review forms printed in previous activities by clicking on the Form History link at the top of the window.
  - The Form History window opens with the list of printed forms.
  - Forms that can be reviewed appear with a green font indicating that the link can be clicked. The interviewer can click on the form name to open and review the form.
- Grid of selected forms
  - The processor can select a form by clicking on the **Add New Form** button in the **Forms Grid** and selecting the form in the **Form drop-down** menu.
  - The processor can remove a form by selecting it in the **Forms Grid**, checking the **Remove** checkbox and clicking on the **Remove Selected** button.
- Form Detail – A drop-down menu to select the form type.
  - **Household Member Menu**, if the form can be printed for individuals on the case.
  - **Detailed Data Entry** section, if additional details must be entered for the form.
- Buttons

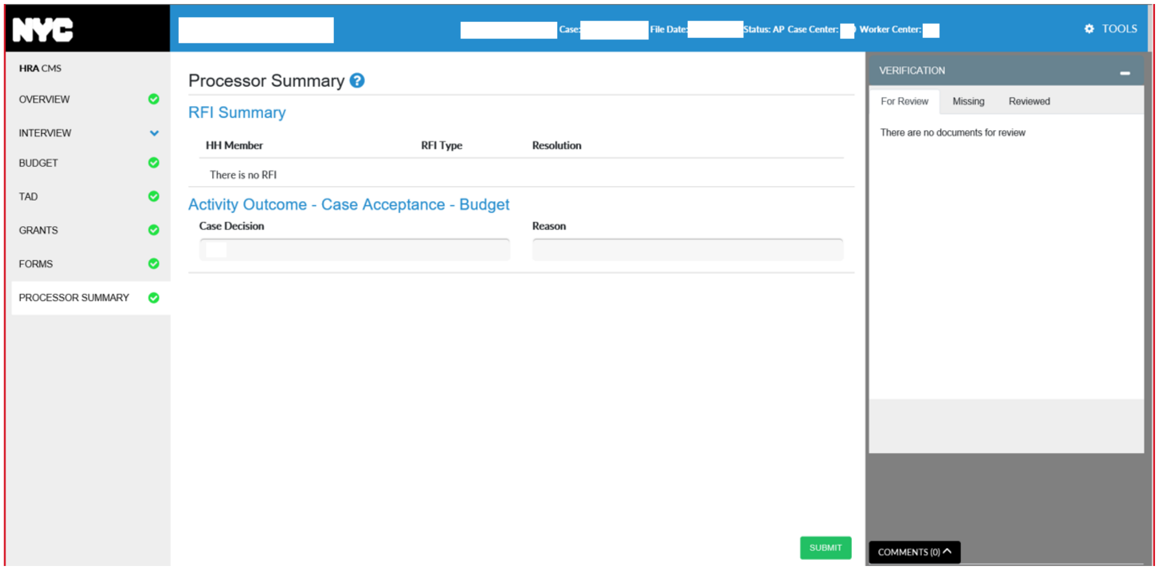


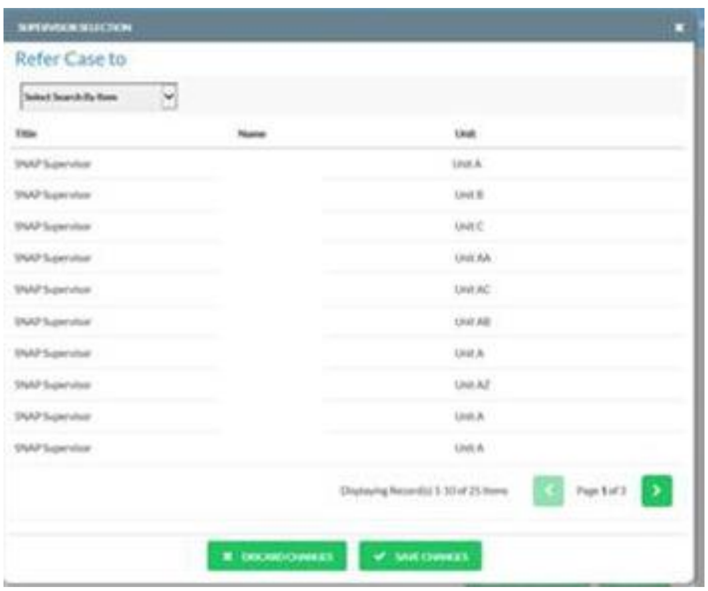


10. Processor Section: Processor Summary

The **Processor Summary** screen allows the Processor to view and resolve Resource File Integration (RFI) matches, view the outcome of the case action, and submission of the case action to the Supervisor:

- **RFI Summary** – The **RFI Summary** section includes a list of resolved and unresolved RFI matches, with the Household Member (HH Member), RFI type and resolution options listed.
  - For resolved RFI matches, the **Resolution** field displays the selected resolution code in WMS.
  - For unresolved RFI matches, the Processor must select the resolution in the **Select drop-down** menu, in accordance with the case decision and click on the **POST RESOLUTION** button. This posts the resolution code(s) to WMS.
- **Activity Outcome** – The **Activity Outcome** section lists the decision for the case (Case Acceptance, Case Denial), the budget number, result and amount (if eligible). It also listed the Case Decision (case status selected on the TAD) and the Reason (case status reason selected on the TAD).
  - For the **SNAP Change Case Data** activity, the processor must also select whether the case includes changes or does not include changes.
- **Submit** button – Processors must click the **Submit** button (on the bottom right-side corner of the **Processor Summary** screen), to access the **Supervisor Selection** dialog box to submit the case to their Supervisor.
  - The Worker's assigned Supervisor in POS enrollment is pre-selected as the default option but the Worker can change the selection and choose another supervisor.
  - Once a Supervisor is selected, click on **Save Changes** to send the case to the Supervisor's queue.





11. Supervisor Approval in SPOS

The **Application**, **Recertification**, **Change Case Data** and **Error Correction Approval** activities open for the Supervisor from their queue or **Action Menu** once the Worker completes the activity.

Supervisors have a customized view and flow in SPOS:

- Overview screen for a quick case overview.
- **Interview Details** in the **Interview Review** screens.
- Integration and approval of ESNAP determination
- Streamlining of budget review, with access to budget details and budget history from a single screen.
- Streamlining of TAD.

- Streamlining of grant approval and access to **Grant Data Entry** details and history from a single screen.
- Processing of print-to-mail forms, return of activities to the processor and transmission to WMS.

The approval activity includes the following screens:

- **Overview** – This read-only screen provides a high-level overview of the case and opens the Information Verification System (IVS) and the HRA One Viewer when the activity starts. There is no approval required in this section.
- **Interview** – This section provides access to the **Interview Data** in a single screen. The Supervisor must approve or disapprove each section.
- **ESNAP Eligibility Determination –** This screen only appears in the **ESNAP Approval** activity to allow the Supervisor to approve or disapprove the ESNAP decision.
- **Budget** – This screen allows the Supervisor to approve or disapprove the WMS budget.
- **TAD** – This screen allows the Supervisor to approve or disapprove updates to case and individual status information.
- **Grants** – This screen allows the Supervisor to review, and approve or disapprove new grants. The Supervisor must approve or disapprove each grant in the **Grants** screen, if any were recorded. The checkmark allows the Supervisor to approve each grant. No approval is required when there are no new grants.
- **Forms** – This screen allows the Supervisor to review, and approve or disapprove the forms for the case.
- **Supervisor Summary** – This screen allows the Supervisor to approve or disapprove the RFI summary, complete the activity and transmit to WMS or to return the case to the Worker for resolution of any disapproved sections.
    - The **Disapproval Outcome** section provides a summary of the disapprovals entered during the **Approval** activity, if any. It includes the **Disapproved** section or question, the household member and line for the disapproved element, the Supervisor name and date, and the disapproval reason(s) and comment(s) entered.

Flow in Application, Recertification and Change Case Data approval activities
The following SPOS screens appear:

- Overview
- Interview
- Budget
- TAD
- Grants
- Forms
- Supervisor Summary

Flow in ESNAP approval
The following SPOS screens appear:

- Overview
- Interview
- ESNAP Eligibility
- Budget
- TAD
- Grants
- Forms
- Supervisor Summary

Flow in Error Correction approval activities
The following SPOS screens appear:

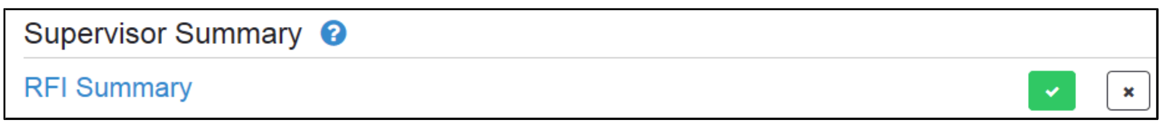
- Overview
- Interview
- Budget
- TAD
- Grants
- Forms
- Supervisor Summary

12. Approving and Disapproving Eligibility Factors

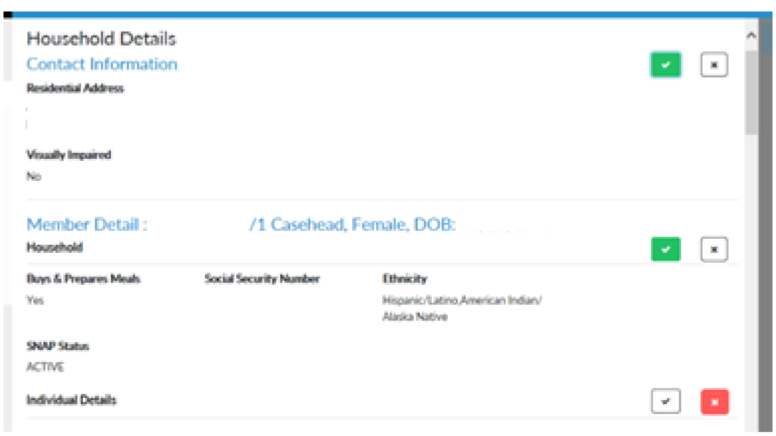
For each eligibility factor in the Interview, **ESNAP Eligibility**, **Budge**t, **TAD**, **Grants and Summary** screens, an approval and disapproval mechanism appears:

- The checkmark allows the Supervisor to approve the eligibility factor.
- The "X" allows the Supervisor to disapprove the eligibility factor.

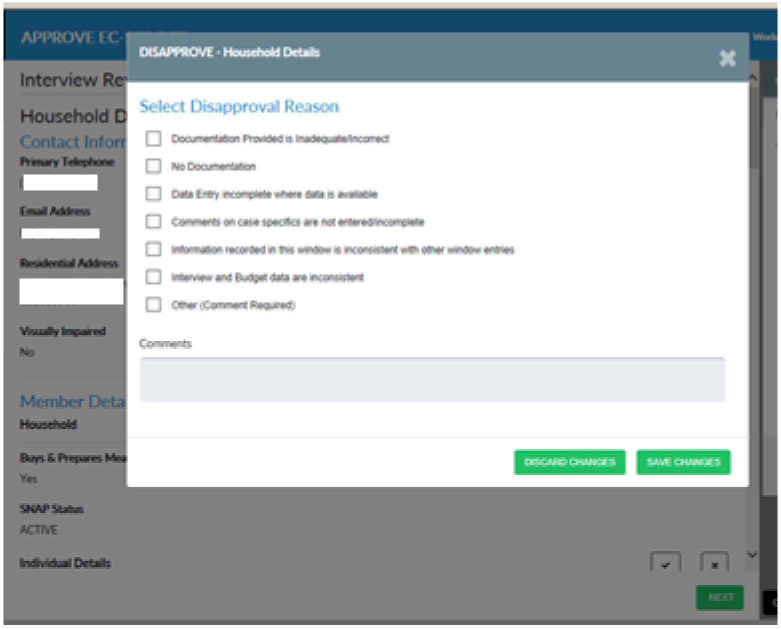
Approval/Disapproval example: RFI Summary



- If disapproving, click the **X** icon and a popup window opens where the Supervisor can select one or more disapproval reasons and also enter a comment. Continue to approve or disapprove each remaining section on the **Interview Review** screen and on the subsequent screens.

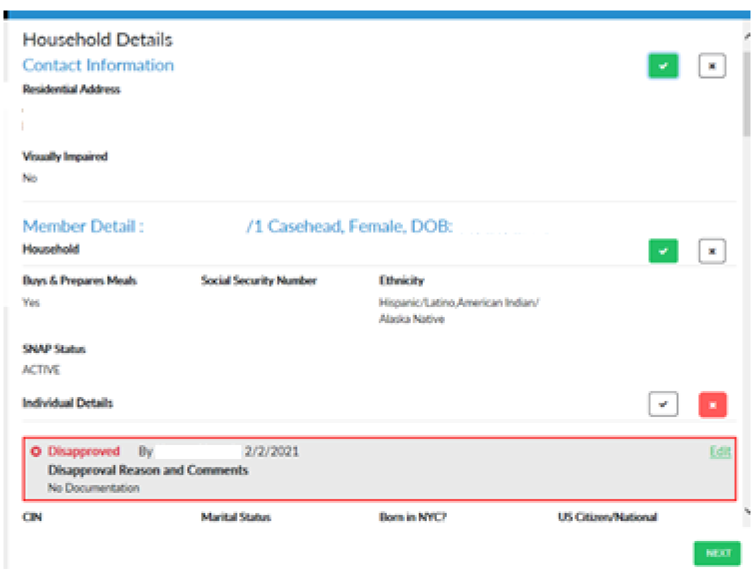


The **Disapproval Reasons Popup** window appears as shown below.



- The supervisor can select one or more of the disapproval reasons presented. If **Other (Comment Required)** is checked, then a comment is required. Press **Save Changes**.

The disapproval reasons will show in a red box for the section that was disapproved as shown here:

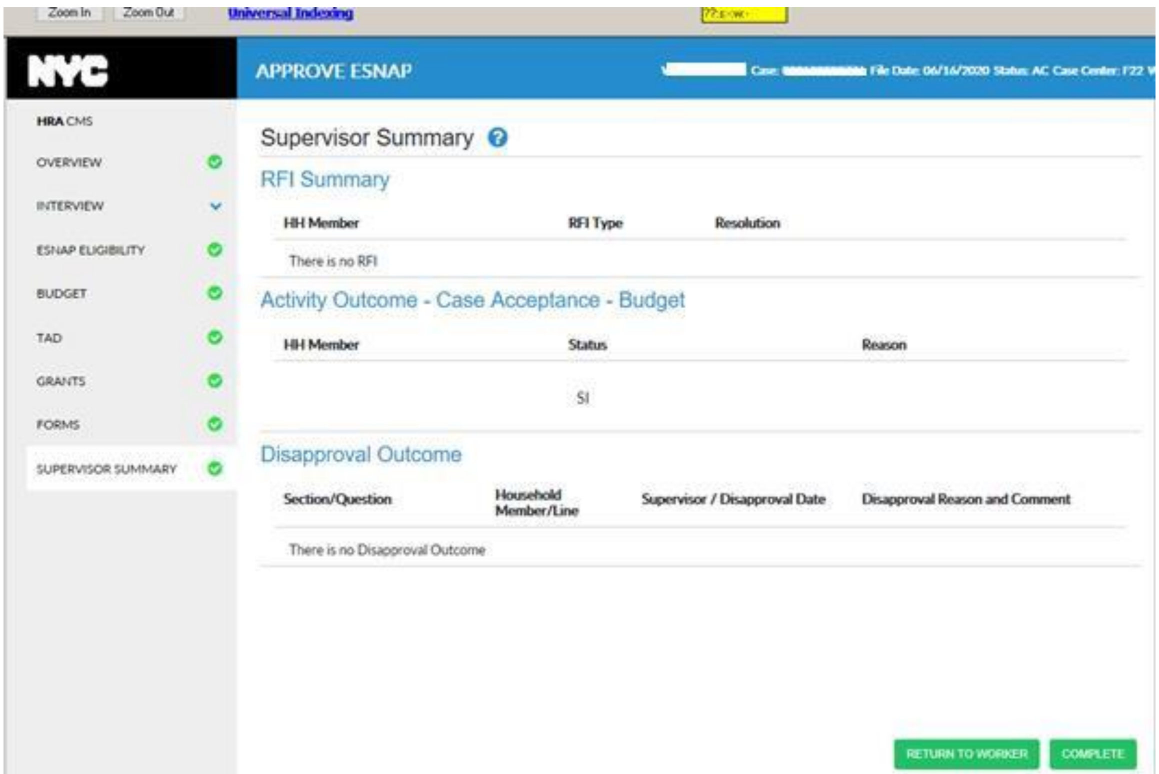


13. Completing the Approval Activities

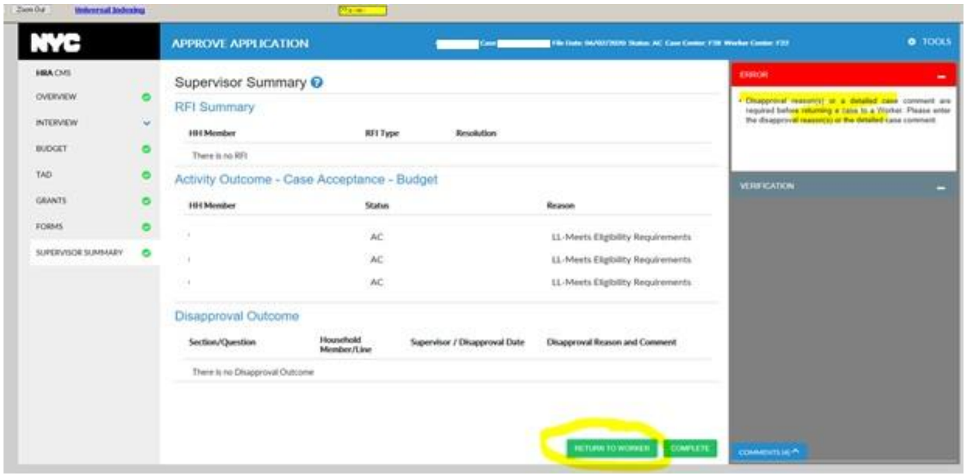
Supervisors complete their approval from the **Supervisor Summary** screen:

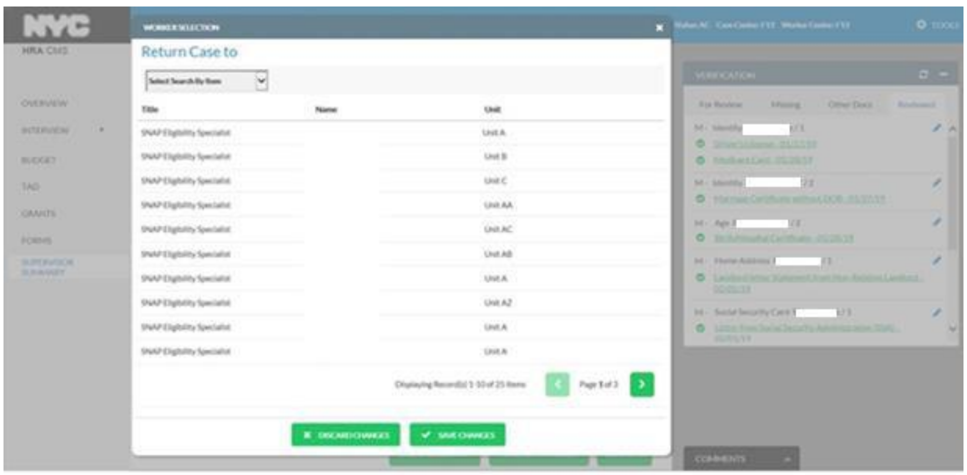
- **Complete button**: The **Complete** button appears at the bottom right-side corner of the **Supervisor Summary** screen for the Supervisor to complete an action and send a transaction to WMS when needed.

- When there are changes that must be transmitted to WMS, SPOS will send the TAD from the Supervisor's activity when the **Complete** button is clicked:
  - **Eligibility** – A TAD transmission to WMS for a case that is in AP status in WMS can be sent to the State for processing eligibility determinations. Transmission of Eligibility Transactions to WMS for their ongoing benefits include **SNAP Application Interview**, **ESNAP issuance**, **Error correction** activities and their corresponding Supervisor approval activities.
  - **Undercare –** A TAD Transmission to WMS for a case that is in SI, AC or CL status in WMS for an Undercare determination can be sent to the State for processing. Supervisors can submit a TAD from SPOS to WMS for a case in AC status in WMS without changes to the SNAP case status and the Undercare determination for a new budget. Selected.address changes and individual changes can be sent to the State for processing.
  - **Grants –** New grants can be submitted to WMS.



- **Return to Worker button**: The **Return to Worker** button appears at the bottom of the **Supervisor Summary** screen to return the case to a Worker for revisions:
  - At least one eligibility factor must be disapproved to return the action to the Worker.
  - When **Return to Worker** is clicked, a dialog box listing the Workers opens.
  - The Worker who sent the case is selected by default, but the Supervisor has the option to choose another Worker, Supervisors may search for Workers by title, name, or unit.
  - The Supervisor clicks **Save Changes** after selecting a Worker and the case is sent back to the Worker.


NYC
APPROVE APPLICATION
TOOLS
OVERVIEW
INTERVIEW
BUDGET
TAD
GRANTS
FORMS
SUPERVISOR SUMMARY
Supervisor Summary
RFI Summary
HH Member
RFI Type
Resolution
There is no RFI
Activity Outcome - Case Acceptance - Budget
Status
Reason
AC
LL-Meets Eligibility Requirements
Disapproval Outcome
Section/Question
Household Member/Line
Supervisor / Disapproval Date
Disapproval Reason and Comment
There is no Disapproval Outcome
ERROR
VERIFICATION
RETURN TO WORKER
COMPLETE


NYC
WORKER SELECTION
Return Case to
Title
Name
Unit
SNAP Eligibility Specialist
VERIFICATION
DISCARD CHANGES
SAVE CHANGES
COMMENTS